

NORTH AMERICAN H2 NEWS BRIEF

北米水素業界ニュース概要



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SEPTEMBER 1 -
OCTOBER 3, 2025

SEP's Curated H2 News, Insights, and Policy Updates for JETRO & JH2F Members

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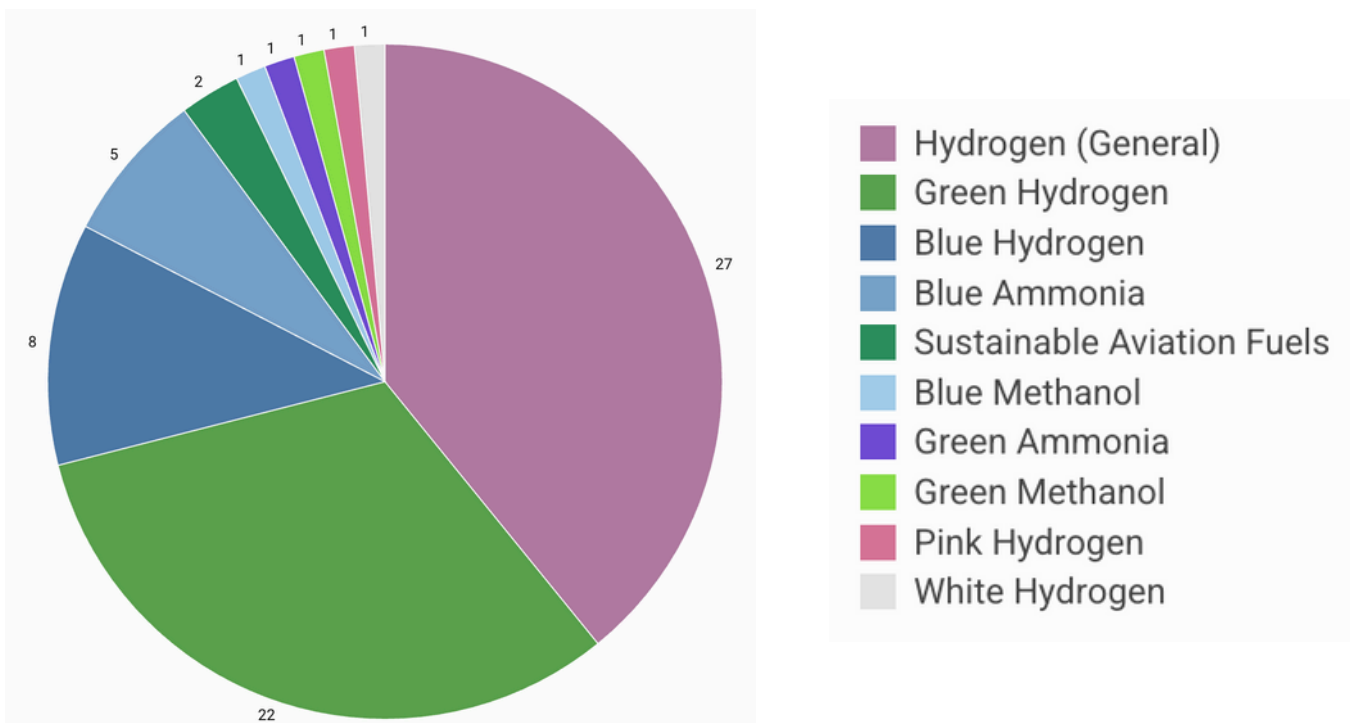
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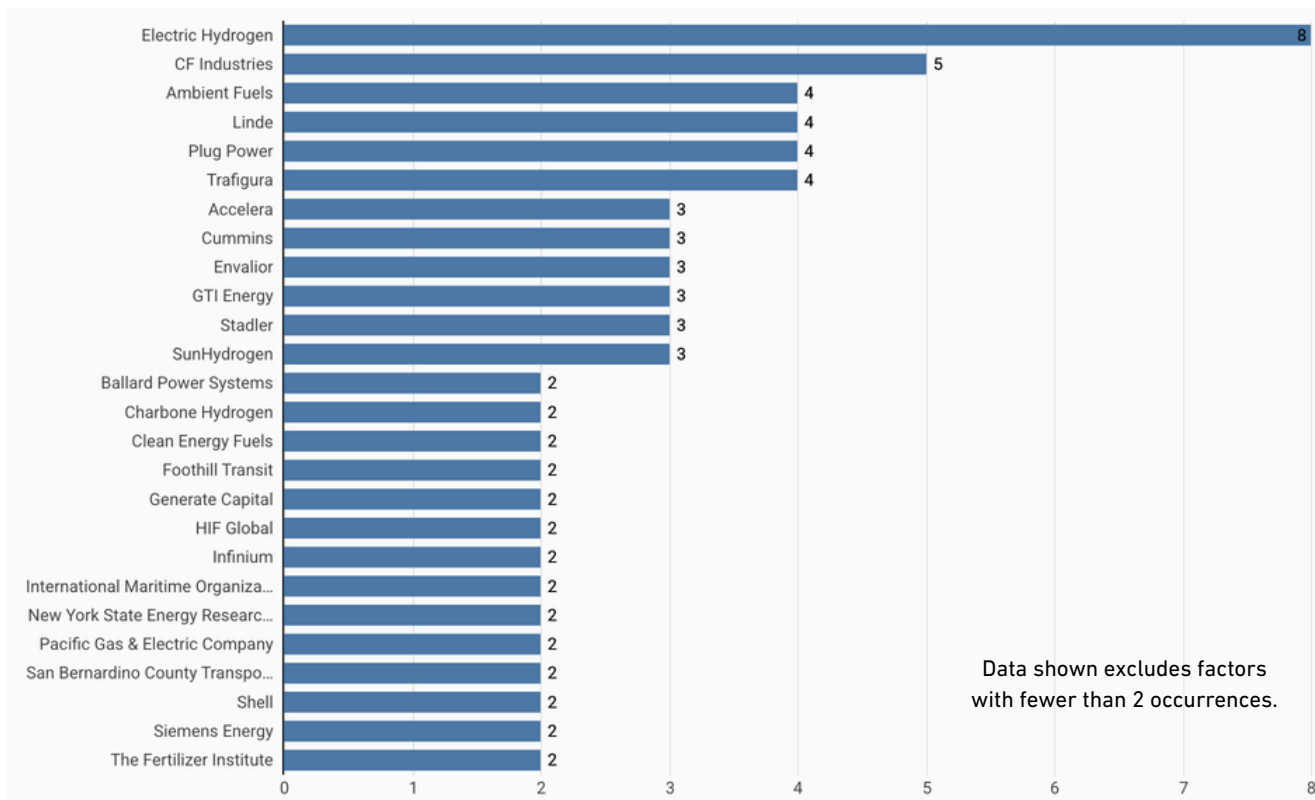


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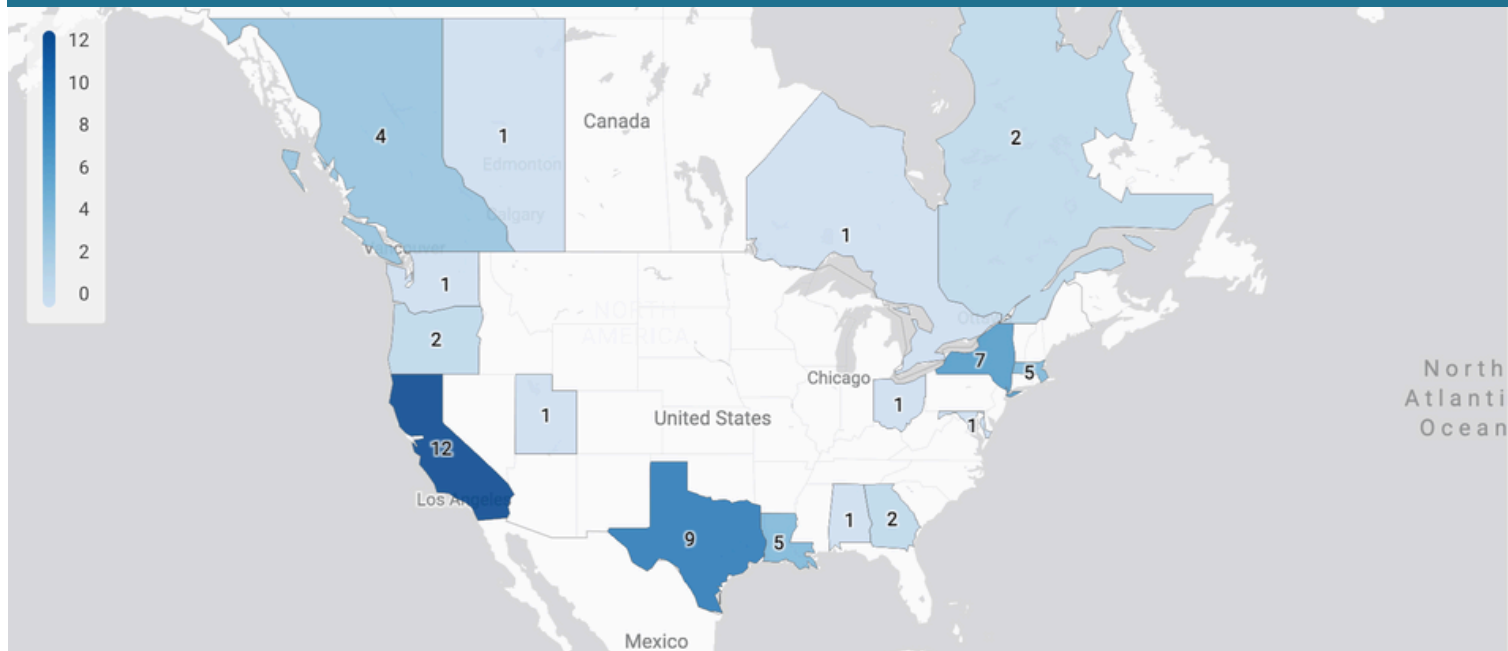


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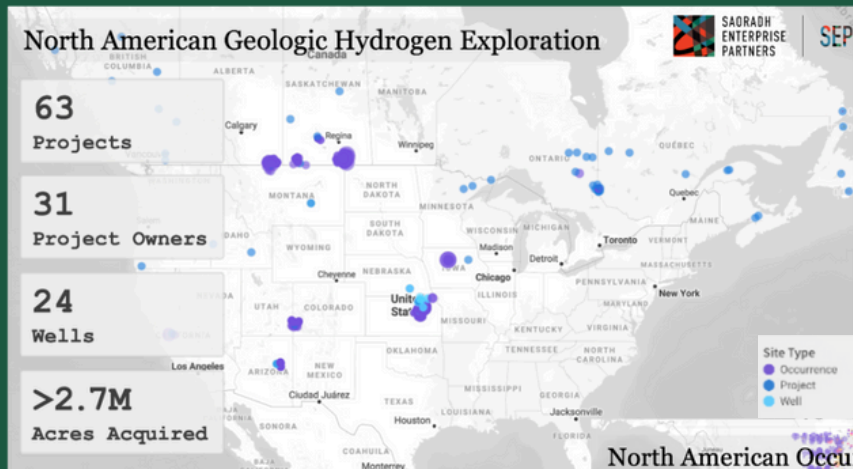


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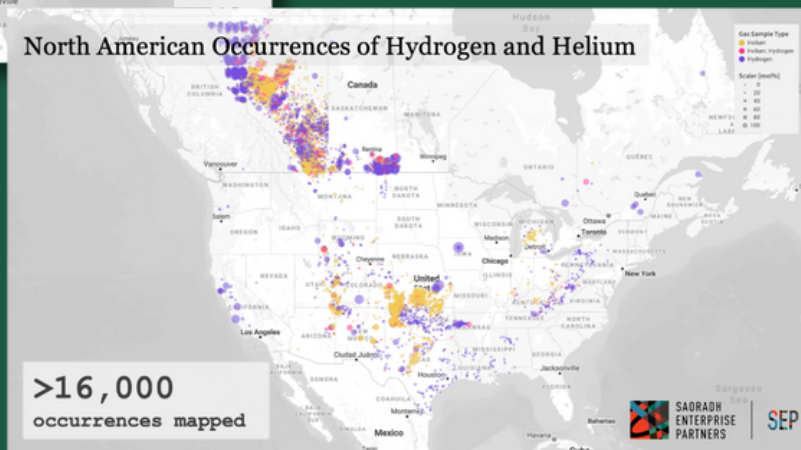
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North American Geologic Hydrogen Tracker / 北米天然水素追跡ツール



North American Occurrences of Hydrogen and Helium



Analyst Note (September 1 - October 3, 2025)

In the wake of the U.S. federal government shutdown on September 30, the Trump administration delivered a stark blow to the clean energy sector, slashing funding for projects across 16 Democrat-led states. Among the casualties were continued funding to the Arches Hydrogen Hub and the Pacific Northwest Hydrogen Hub, two flagship initiatives that together represented nearly \$2 billion in promised federal investment to catalyze domestic hydrogen production and infrastructure. Yet, as the Pacific Northwest Hydrogen Hub's leadership aptly captured in their statement: *"The future of hydrogen is still being written by states, communities, and industries across the country. With or without federal support, this industry will continue to drive the innovation and infrastructure needed to fortify America's energy economy."* This news, echoed by California and others, only amplified the sector's resilience that has been tested repeatedly over the past year. Despite this decision coming out of Washington D.C., the past month was full of incremental wins, signalling an industry undeterred.

While recent months have been headlined by small-scale projects and technology developments, the U.S. saw some of its largest projects gain traction in September. CF Industries, the world's largest ammonia producer, achieved a milestone by shipping 23,500 metric tons of certified low-carbon ammonia from its Donaldsonville, Louisiana facility on September 25—its first export under the Verified Ammonia Carbon Intensity (VACI) program. Commodities leader Trafigura purchased this shipment for delivery to Envalor in Antwerp, Belgium, where it will enable low-carbon caprolactam production. In Texas, HIF Global selected Electric Hydrogen to provide 1.8 GW of PEM electrolyzers for its world-scale e-fuels site in Matagorda. A clear winner in September, Electric Hydrogen also announced that its 100 MW electrolyzer plant at Infinium's Project Roadrunner site in West Texas neared mechanical completion, with hydrogen production slated to begin in December 2025 to power sustainable aviation fuel (e-SAF) under a landmark 10-year supply deal with International Airlines Group, British Airways' parent company. Across the country in New York, the Accelera group at Cummins delivered a 35 MW PEM electrolyzer to Linde's plant in Niagara Falls, where it will be powered by hydroelectric energy.

California and Washington State continue to lead the charge in strengthening the U.S. hydrogen mobility industry. In Washington, construction kicked off on the Port of Chehalis Hydrogen Production & Fueling Station, led by Lewis County Transit with \$9.7 million in public-private funding; set to produce up to 2,000 kg/day of green hydrogen using just 54 kW of renewable power and minimal water, it will supply 750 kg/day for the agency's fuel-cell buses and reserve 1,250 kg/day for regional fleets, coming online in spring 2026. Shifting south to California, Clean Energy Fuels secured a contract to design, build, and maintain a second hydrogen fueling station for Foothill Transit, extending their two-decade partnership to bolster the agency's expanding low-emissions bus fleet.

and accelerate hydrogen adoption in heavy-duty applications. Meanwhile, Stantec teamed up with The Papé Group's subsidiary Pacific Clean Fuels to deploy hydrogen fueling solutions at multiple sites statewide. Perhaps most excitingly, North America's first hydrogen-powered passenger train, a Stadler-built hybrid fuel cell-battery model, entered service, operating up to 16 daily trips along the nine-mile San Bernardino to Redlands University route.

September proved particularly active for hydrogen's emerging markets, with announcements related to data centers, sustainable aviation fuel (SAF), geologic hydrogen, and resilient microgrids.

- Pacific Gas and Electric (PG&E), partnering with Energy Vault, commissioned the U.S.'s largest green-hydrogen energy-storage microgrid at the Calistoga Resiliency Centre in Napa County, California—a 293 MWh hybrid system blending hydrogen fuel cells and lithium-ion batteries to deliver up to 8.5 MW continuously for 48 hours, powering around 1,600 customers during wildfire-induced shutoffs.
- Lambda deployed the first production-grade hydrogen-fueled NVIDIA GB300 NVL72 systems at ECL's zero-water, zero-emissions off-grid data center in Mountain View, California, supporting efficient AI training and inference with rapid two-hour cabinet integration and water-recycling cooling.
- National Grid Ventures initiated the world's first commercial 100% H2 linear generator at New York's Northport Power Plant, funded by NYSERDA, LIPA, and partners like Stony Brook University and Mainspring Energy; the flameless system will test green H2 for peak demand over 12 months, targeting operations by September 2026.
- Delta Air Lines, Shell, and Portland International Airport integrated 400,000+ gallons of blended SAF, made from U.S. waste feedstocks by Montana Renewables, into PDX's system via multi-modal delivery, marking the site's first commercial uplift.
- The number of geologic hydrogen projects being tracked by SEP in North America now exceeds 60 (including 24 permitted wells) with over 100 companies globally developing technologies and projects in this sector.

As the dust settles on the Trump administration's decision to defund the Arches and Pacific Northwest hydrogen hubs, states and regions are picking up the gauntlet to continue building the US hydrogen markets. In addition, larger scale projects that target strong hydrogen markets such as for SAF, clean methanol for ship bunkering, and ammonia exports continue to gain traction. Much like the Pacific Northwest Hub's statement that "the future of hydrogen is still being written by states, communities, and industries," success for clean hydrogen production and use in the US and elsewhere in North America will be more nuanced, driven by specific end-use applications and sub-market demand.

9月30日の米国連邦政府閉鎖を受け、トランプ政権は民主党が主導する16州にわたるプロジェクトへの資金提供を大幅に削減することでクリーンエネルギーセクターに深刻な打撃を与えました。その犠牲となったのが、カリフォルニア水素ハブとパシフィック・ノースウエスト水素ハブへの継続的資金提供でした。これら2つの主要施策は、国内の水素生産とインフラ整備を促進するために、連邦政府が約束した総額約20億ドルの投資を象徴する存在でした。

しかし、パシフィック・ノースウエスト水素ハブのリーダーシップが声明で的確に指摘したように、「水素の未来は、全米の州、地域社会、産業によって今も描かれ続けています。連邦政府の支援の有無にかかわらず、この産業はアメリカのエネルギー経済を強化するために必要なイノベーションとインフラ整備を推進し続けるでしょう。」このニュースはカリフォルニア州などからも支持され、過去1年間に繰り返し試練に直面してきた同セクターの回復力を改めて示すものとなりました。ワシントンD.C.からのこの決定にもかかわらず、この1か月は積み重ねられた勝利に満ちており、業界の揺るぎない姿勢を示唆していました。

ここ数か月は小規模プロジェクトや技術開発が話題の中心でしたが、9月には米国最大級のプロジェクトが勢いを増しました。世界最大のアンモニア生産者であるCFインダストリーズは、9月25日にルイジアナ州ドナルドソンビル工場から認証済み低炭素アンモニア23,500トンを出荷し、検証済みアンモニア炭素強度(VACI: Verified Ammonia Carbon Intensity)プログラムに基づく初の輸出という画期的な成果を達成しました。商品取引大手のトラフィグラがこの製品を購入し、ベルギーのアントワープにあるエンバリオに届けられ、低炭素カプロラクタムの生産に使用されます。テキサス州では、HIFグローバルがマタゴルダにある世界規模の合成燃料(e-fuels)サイト向けに1.8 GWのPEM電解装置を提供するエレクトリック・ハイドロジェンを採用しました。9月の明確な勝者となったエレクトリック・ハイドロジェンは、テキサス州西部にあるインフィニウム社のプロジェクト・ロードランナーの敷地での100 MW電解装置プラントが完工に近づいていることも発表しました。水素生産は2025年12月に開始される予定で、ブリティッシュ・エアウェイズの親会社であるインターナショナル・エアラインズ・グループとの画期的な10年間の供給契約に基づき、持続可能な航空燃料(e-SAF)の供給を目的としています。また、対岸側のニューヨーク州では、カミンズのアクセラ・グループが、ナイアガラフォールにあるリンデ社の工場に35 MWのPEM電解装置を納入しました。この装置は水力発電で稼働する予定です。

カリフォルニア州とワシントン州は、米国の水素モビリティ産業の強化において引き続き主導的な役割を果たしています。ワシントン州では、ルイス郡交通局が主導し、970万ドルの官民資金を得て、チェハリス港水素製造・充填ステーションの建設が始まりました。この施設は、わずか54 kWの再生可能エネルギーと最小限の水を使用して、1日最大2,000 kgのグリーン水素を生産する予定です。そのうち750 kg/日は同局の燃料電池バスに供給され、残りの1,250 kg/日は地域車両用に確保され、2026年春に稼働開始予定です。南のカリフォルニア州に目を向けると、クリーン・エナジー・フュエルズ社がフットヒル・トランジット向けの2つ目の水素燃料補給ステーションの設計、建設、および保守契約を獲得しました。これにより、20年に及ぶ提携関係を拡大し、同局の低排出ガスバス車両の拡充を支援するとともに、大型車両分野における水素利用の普及を加速させます。一方、スタンテックは、ザ・パペ・グループの子会社であるパシフィック・クリーン・フュエルズと提携し、州内の複数の拠点で水素燃

料補給ソリューションを展開しています。最も注目すべきは、北米初の水素駆動旅客列車が運行を開始したことでしょう。シュタッドラー社製ハイブリッド燃料電池・バッテリーモデルで、サンバーナーディーノからレッドランズ大学までの9マイル区間を1日最大16往復運行しています。

9月は、水素の新興市場において特に活発な月となり、データセンター、持続可能な航空燃料(SAF)、天然水素、および回復力のあるマイクログリッドに関連する発表が相次ぎました。

- パシフィック・ガス・アンド・エレクトリック社(PG&E)は、エナジー・ボールド社と提携し、カリフォルニア州ナパ郡のカリストガ・レジリエンシー・センターで、米国最大級のグリーン水素エネルギー貯蔵マイクログリッドを稼働させました。これは、水素燃料電池とリチウムイオンバッテリーを組み合わせた293 MWhのハイブリッドシステムで、48時間連続で最大8.5 MWの電力を供給し、山火事による送電停止時には約1,600世帯に電力提供可能です。
- ラムダ社は、カリフォルニア州マウンテンビューにあるECLのゼロ水・ゼロ排出のオフグリッドデータセンターで、業界初の生産グレードの水素燃料NVIDIA GB300 NVL72システムを導入しました。これは、迅速な2時間のキャビネット統合と水リサイクル冷却により、効率的なAIトレーニングと推論をサポートします。
- ナショナル・グリッド・ベンチャーズは、ニューヨーク州ノースポート発電所で、世界初の商用100%水素リニア発電機を導入しました。ニューヨーク州エネルギー研究開発局(NYSERDA)、ロングアイランド電力公社(LIPA)、およびストーニーブルック大学やメインスプリング・エナジーなどのパートナーからの資金提供を受けており、この無炭システムは、2026年9月の稼働開始を目指し、12ヵ月間にわたりピーク需要向けのグリーン水素を試験運用します。
- デルタ航空、シェル、およびポートランド国際空港(PDX)は、モンタナ・リニューアブルズ社が米国の廃棄物原料から製造した40万ガロン以上の混合SAFを、複合輸送によりPDXのシステムに統合し、同空港で初の商業供給となりました。
- 北米でSEPが追跡している天然水素プロジェクトの数は現在60件を超え(許可済み井戸24件を含む)、世界100社以上の企業がこの分野の技術開発とプロジェクト推進に取り組んでいます。

トランプ政権によるカリフォルニア水素ハブとパシフィック・ノースウエスト水素ハブへの資金提供打ち切り決定の騒ぎが収束に向かう中、各州や地域は米国の水素市場構築を継続すべく、厳しい試練に直面しています。さらに、SAF、船舶燃料供給用のクリーンメタノール、アンモニア輸出など、堅調な水素市場をターゲットとした大規模プロジェクトは、引き続き勢いを増しています。

パシフィック・ノースウエスト水素ハブの「水素の未来は、全米の州、地域社会、産業によって今も描かれ続けています」という声明が示すように、米国および北米におけるクリーン水素の生産と利用の成功は、特定の最終用途とサブマーケットの需要によって、より複雑な様相を呈するでしょう。

Policies / 政策

September 1 - October 3, 2025

10/03/2025 - Trump's DOE axes \$2.2bn funding for California and Pacific Northwest hydrogen hubs

2025年10月3日 トランプ政権下のエネルギー省、カリフォルニアおよび太平洋岸北西部の水素ハブ向け22億ドルの資金提供を撤回

The US Department of Energy has terminated funding for two clean hydrogen hubs, previously selected for a combined \$2.2bn. California's Alliance for Renewable Clean Hydrogen Energy Systems (ARCHES), and the Pacific Northwest Regional Hydrogen Hub (PNWH2) both saw funds cut as part of a wider \$7.5bn rollback, largely targeting projects in Democratic-leaning states. The funding stemmed from the Biden administration's \$8bn clean regional hydrogen hubs programme under the Bipartisan Infrastructure Law. ARCHES, which was due to receive \$1.2bn from the DOE, criticised the decision, calling it a "short-sighted move that abandons America's opportunity to lead the global energy transition." [Full Story](#)

10/02/2025 - PNWH2 Statement on DOE Funding Cuts

2025年10月2日 エネルギー省の資金削減に対する太平洋岸北西部水素ハブの声明

Regardless of the political fighting in Washington, D.C., hydrogen remains a viable product for energy dominance and represents a market worth hundreds of billions of dollars that generates millions of jobs. While we are disappointed in the Department of Energy's decision to cut funding for the Pacific Northwest Hydrogen Hub, there is still immense opportunity for our region to finish what we started—establishing a national benchmark for hydrogen production that brings economic opportunities to communities across the region. PNWH2 will continue to support our project and industry partners that have laid the foundation for a thriving hydrogen ecosystem throughout the Pacific Northwest. The future of hydrogen is still being written by states, communities, and industries across the country. With or without federal support, this industry will continue to drive the innovation and infrastructure needed to fortify America's energy economy..

[Full Story](#)

9/17/2025 - US EPA rollback risks undermining blue hydrogen credibility, EDF warns

2025年9月17日 米国EPAの規制緩和、ブルー水素の信頼性を損なうリスクがあるとEDFが警告

Environmental Defense Fund (EDF) has warned US blue hydrogen risks losing climate credibility if the Environmental Protection Agency (EPA) scraps mandatory greenhouse gas (GHG) reporting. The non-profit advocacy group's Energy Program Senior Attorney, Nichole Saunders, told H2 View the narrowed window of eligibility for the up to \$3/kg 45V clean hydrogen tax credit had weakened green hydrogen's position, making way for more blue projects. According to the Hydrogen Council's latest report, the US is set to become the largest supplier of blue hydrogen, with 1.4 million tonnes per year already contracted for offtake domestically and in Asia. [Full Story](#)

Projects / プロジェクト

September 1 - October 3, 2025

10/01/2025 - First molecules from Electric Hydrogen's debut 100MW electrolyser set for December

2025年10月1日 エレクトリック・ハイドロジェン社、初の**100MW**電解装置から**12月**に最初の分子を生産へ

Electric Hydrogen's first 100MW electrolyser plant is set to begin producing hydrogen at Infinium's large-scale e-fuels plant in Texas in December 2025. In a showcase session at European Hydrogen Week, Electric Hydrogen's Senior Vice-President, Global Commercial, Jason Mortimer, said the plant was nearing mechanical completion ahead of passivation next month. The installation at Infinium's Project Roadrunner site in West Texas will provide hydrogen to produce e-SAF, which is set to be supplied to British Airways owner International Airlines Group under a 10-year deal. The US electrolyser maker began site preparation in June, which Mortimer said showed the benefit of Electric Hydrogen's pre-fab plant model. [Full Story](#)

9/26/2025 - PG&E launches California's first hydrogen-battery hybrid microgrid

2025年9月26日 **PG&E**、カリフォルニア初の水素・バッテリーハイブリッド型マイクログリッドを稼働
California utility Pacific Gas and Electric (PG&E), in partnership with Energy Vault, has launched a long-duration hybrid microgrid combining hydrogen fuel cells and batteries. Located in Napa County, the Calistoga Resilience Centre (CRC) is designed to keep the town powered during wildfire shutoffs and to serve as a model for Net Zero backup systems. The region has faced multiple major wildfires in recent years, including the 2017 Tubbs Fire. PG&E said the 293MWh microgrid can supply up to 8.5MW for at least 48 hours continuously. The facility integrated hydrogen fuel cells and lithium-ion batteries, and can reportedly supply electricity to around 1,600 customers for at least 48 hours if PG&E shuts off the main grid during an emergency. Because the system uses liquid hydrogen stored on-site, more hydrogen can be delivered and added to the tank without shutting the system down, reportedly allowing it to run for longer at lower cost than traditional backup options. [Full Story](#)

9/23/2025 - Lambda and ECL Bring the First Hydrogen-Powered NVIDIA GB300 NVL72 Systems Online

2025年9月23日 ラムダ社と**ECL**、初の水素駆動型**NVIDIA GB300 NVL72**システムを導入
Lambda, the Superintelligence Cloud, today announced the deployment of the industry's first hydrogen-powered, production-grade NVIDIA GB300 NVL72 systems at ECL's Mountain View campus (MV1), a zero-water and zero-emissions off-grid modular data center that operates entirely on hydrogen fuel cells for AI inference and foundational model training with unprecedented efficiency. The Supermicro-built GB300 NVL72 systems each receive 142 kW of compute power, cooled through direct-to-chip liquid systems fed by centralized CDUs that recycle water generated as a byproduct of power production. This combination of NVIDIA AI infrastructure with sustainable energy at true production scale marks an industry first. Remarkably, the cabinets were fully integrated into the data center in just two hours—a world-class benchmark for deploying such advanced systems. [Full Story](#)

Projects / プロジェクト

September 1 - October 3, 2025

9/17/2025 - Pelican Sequestration Hub: emissions offtake from CF, JERA ammonia mega-project

2025年9月17日 ペリカン・セクエステレーション・ハブ、CF社、JERAのアンモニア・メガプロジェクトからの排出物オフテイク

The pair will form a 50:50 joint venture to develop the Pelican Sequestration Hub. 1PointFive will develop the facilities and infrastructure required to sequester captured CO2 underground in Livingston Parish, Louisiana, while Enbridge will build and operate pipelines to transport compressed, liquefied CO2 from customer facilities to the hub. The Pelican Sequestration Hub is already “anchored” by a 25 year offtake agreement between CF and 1PointFive for ~2.3 million tons of CO2 per year from the Blue Point project: a joint venture between CF Industries, JERA, and Mitsui & Co. that will produce 1.4 million tons per year of low-carbon ammonia. [Full Story](#)

09/16/2025 - HIF Global Selects Electric Hydrogen’s Advanced American Electrolyzer Technology for Texas e-Fuels Project

2025年9月16日 HIFグローバル社、テキサス州の合成燃料(e-Fuel)プロジェクト向けにエレクトリック・ハイドロジェン社の先進的な米国製電解装置技術を選定

HIF Global, the world’s e-Fuels leader, announced today that it has selected Electric Hydrogen (EH2) to supply its cutting-edge electrolyzer systems for HIF’s Texas e-Fuels facility. Meg Gentle, Executive Director of HIF Global, said, “The project will be one of the world’s largest deployments of American-made electrolyzers, establishing a new benchmark for e-Methanol production at industrial scale, and driving U.S. energy leadership and economic development deep in the heart of Texas. HIF’s selection of Electric Hydrogen electrolyzers was made possible by the committed leadership of key senators establishing U.S. dominance in advanced energy markets.” [Full Story](#)

09/16/2025 - Dow confirms up to two-year delay for chemicals complex with blue hydrogen

2025年9月16日 ダウ社、ブルー水素を含む化学複合施設の歓声が最大2年間遅延する事を確認
Chemical company Dow Inc’s flagship blue hydrogen-based chemicals complex in Alberta, Canada, will be delayed by up to two years amid market weakness. CEO Jim Fitterling confirmed the delay to its Path2Zero project, originally announced in April, could last between one and two years until market conditions improve, pushing back what had been billed as a showcase for hydrogen in chemicals decarbonisation. The \$11.5bn Path2Zero project plans to expand Dow’s ethylene and polyethylene capacity in Fort Saskatchewan while cutting around 1.5 million tonnes of annual carbon dioxide emissions. [Full Story](#)

9/05/2025 - Charbone secures used hydrogen equipment to start flagship production in Q4

2025年9月5日 シャルボーン社、第4四半期に旗艦プロジェクトの生産開始に向け中古水素設備を確保

Charbone Hydrogen will repurpose an electrolyser and hydrogen refuelling equipment first installed at a Quebec multi-energy station for its flagship project. The Canadian firm has signed

Projects / プロジェクト

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an asset purchase agreement to acquire the equipment already used by Quebec-based energy and fuels company Harnois Énergies. While precise details on the equipment in question remain unrevealed, Harnois has been producing and dispensing hydrogen at its Quebec City multi-energy station since 2019, featuring a Cummins Hystat alkaline electrolyser. [Full Story](#)

9/04/2025 - Plug Power delivers record output at Georgia green hydrogen plant

2025年9月4日 プラグ・パワー社、ジョージア州のグリーン水素プラントで過去最高の生産量を達成
Plug Power produced 324 tonnes of green hydrogen at its Georgia plant during August, a production record for the US-based firm. The Woodbine plant ran at 97% uptime, 99.7% availability (excluding a grid outage) and 92.8% efficiency, the green hydrogen company reported. The Georgia plant uses its 5MW GenEco electrolyzers, which are part of its modular PEM line. Plug said the production record proves the systems can “deliver high-performance backed by real-world results.” [Full Story](#)

9/04/2025 - National Grid Ventures to install world's first 100% H2-fueled commercial linear generator

2025年9月4日 ナショナル・グリッド・ベンチャーズ、世界初の100%水素燃料商用リニア発電機を設置へ

National Grid Ventures (NGV) announced it will install the first commercially-deployed, 100% H2-fueled linear generator in the world at its Northport Power Plant, supported by the New York State Energy Research and Development Authority (NYSERDA) and the Long Island Power Authority (LIPA). The remaining funding is provided directly by NGV, while Stony Brook University and Mainspring Energy are also essential project partners. The linear generator produces power through a low-temperature, flameless chemical reaction and can be used during periods of peak demand. For the 12-month testing period, it will run on 100% green H2, while undergoing rigorous testing. The linear generator is expected to be operational by September 2026. [Full Story](#)

9/04/2025 - Stantec partnering with Pacific Clean Fuels to develop H2 fueling solutions in California (U.S.)

2025年9月4日 スタンテック社、パシフィック・クリーン・フューエルと提携しカリフォルニア州で水素燃料補給ソリューションを開発

Stantec, a global leader in sustainable design and engineering, is partnering with The Papé Group through their subsidiary Pacific Clean Fuels to develop H2 fueling solutions at multiple locations throughout California. As a leading capital equipment provider, Pacific Clean Fuels is making significant strides in promoting H2 as a key solution across multiple industries in the U.S. West. H2 is a critical element of the energy transition and will be leveraged to power communities and reduce greenhouse gases (GHG) in the U.S. and around the world. [Full Story](#)

Projects / プロジェクト

September 1 - October 3, 2025

9/03/2025 - Accelera delivers its largest electrolyzer system to hydrogen facility in New York

2025年9月3日 アクセラ社、ニューヨークの水素施設に過去最大の電解装置システムを納入
Accelera™ by Cummins, the zero-emissions business segment of Cummins Inc. [NYSE: CMI], has supplied a 35-megawatt (MW) proton exchange membrane (PEM) electrolyzer system, its largest to date, to support hydrogen production at Linde's facility in Niagara Falls, New York. Powered by renewable hydroelectric energy, the system will generate green hydrogen to help decarbonize industrial operations and accelerate the clean energy transition in the U.S. "The successful delivery of this 35MW electrolyzer system is a significant milestone for Accelera and for the advancement of clean hydrogen technology in North America," said Des McMenamin, General Manager – Electrolyzers for Accelera. "This project demonstrates our ability to deliver large-scale, reliable solutions that enable our customers to produce green hydrogen on a commercial scale." [Full Story](#)

Mobility/Transportation / モビリティ／輸送

September 1 - October 3, 2025

6/10/25 - CF Industries, Trafigura and Envalior Announce Shipment of Certified Low-Carbon Ammonia

2025年10月6日 CFインダストリーズ、トラフィグラ、エンバリオが認証済み低炭素アンモニアの出荷を発表

CF Industries Holdings, Inc. (NYSE: CF), the world's largest producer of ammonia, today announced a shipment of certified low-carbon ammonia from its Donaldsonville, Louisiana, facility. Trafigura, a market leader in the global commodities industry, purchased the ammonia for shipment to Envalior, a global leader in Engineering Materials, which intends to use the low-carbon ammonia for the production of low-carbon caprolactam. Trafigura has loaded 23,500 metric tons of low-carbon ammonia on the 25th of September destined for Antwerp, Belgium. The low-carbon ammonia is certified under the Verified Ammonia Carbon Intensity (VACI) Program to have a significantly lower well-to-gate carbon footprint than conventional natural gas-based ammonia production. [Full Story](#)

9/25/2025 - Clean Energy to Build Second Hydrogen Station for Foothill Transit's Expanding Fleet of Low-Emissions Buses

2025年9月25日 クリーン・エナジー社、フットヒル・トランジット社の低排出バス事業拡充に向けた2番目の水素ステーションを建設へ

Clean Energy Fuels, the largest provider of the cleanest fuel for the transportation market, announced it has been awarded the contract to design, build and maintain a second hydrogen

fueling station for Foothill Transit, continuing an over 20-year partnership to support the agency's growing fleet of low-emissions buses. [Full Story](#)

9/16/2025 - American Bureau of Shipping joins Trump in slamming draft IMO rules, as it pans hydrogen-based maritime fuels

2025年9月16日 アメリカ船級協会、水素ベースの船用燃料を批判し、トランプ大統領に同調し国際海事機関(IMO)草案規則を非難

Senior executives at the American Bureau of Shipping (ABS) have joined US president Donald Trump's resistance to global greenhouse gas rules for shipping — rules which many believe will help bolster demand for green hydrogen-based fuels — ahead of a key vote next month.

Christopher Wiernicki, who is chief executive and chairman of the US-headquartered classification society, said the International Maritime Organization (IMO) needs to “pause and rethink” its Net-Zero Framework. “The IMO needs to take a timeout,” he said in a statement released during London International Shipping Week yesterday (Monday). “We need to get this right.” [Full Story](#)

9/16/2025 - Delta, Shell and the Port of Portland Partner for SAF Uplift at Portland International Airport

2025年9月16日 デルタ航空、シェル、ポートランド港がポートランド国際空港でのSAF供給で提携
Delta Air Lines, in collaboration with Shell and Portland International Airport (PDX), has taken delivery of Sustainable Aviation Fuel (SAF) into the PDX fuel system, marking the first commercial-scale SAF uplift at PDX. Delta, Shell and the Port of Portland Partner for SAF Uplift at Portland International Airport. This achievement not only expands Delta's SAF footprint but positions PDX – owned and operated by the Port of Portland – to capitalize on the continued growth of SAF across the U.S. The batch of more than 400,000 gallons of blended SAF was produced by Montana Renewables in the U.S. from waste-derived feedstock. Shell then supplied the SAF shipment to Zenith Terminal in Portland where it was blended with traditional jet fuel to meet regulatory requirements and delivered to PDX via barge, truck and pipeline. [Full Story](#)

9/15/2025 - North America's 'first' hydrogen passenger train enters service in California

2025年9月15日 北米初の水素旅客列車がカリフォルニア州で運行開始

North America's “first” hydrogen-powered passenger train has entered service in California. The new Stadler-made hybrid hydrogen fuel cell-battery train will operate on a nine-mile route between San Bernardino and Redlands University on up to 16 trips per day. San Bernardino County Transport Authority (SBCTA) marked the launch by offering free metro rides in the city on its first day of service. [Full Story](#)

Mobility/Transportation / モビリティ／輸送

September 1 - October 3, 2025

9/02/2025 - Port of Chehalis Breaks Ground on \$9.7M Green Hydrogen Station for Public Transit

2025年9月2日 チェハリス港、公共交通機関向け**970万ドル**のグリーン水素ステーションの起工式を実施

Construction has officially begun on one of Washington state's first hydrogen production and fueling stations, as officials broke ground on the Port of Chehalis Hydrogen Production & Fueling Station this week. Spearheaded by Lewis County Transit and backed by \$9.7 million in public and private funding, the project will generate up to 2,000kg of green hydrogen per day for municipal fleets across the region once it comes online in spring 2026. "With equipment now procured, construction is underway on a project that will serve as a model for federal, state, and local agencies—demonstrating how a hydrogen station can support public fleets and regional hydrogen distribution." The facility will produce 750kg/day for Lewis County Transit's own zero-emission buses, and reserve an additional 1,250kg/day for other municipalities that lack on-site hydrogen generation. The system will use roughly 54kW of green power and just 2.9 gallons of city water per kilogram of hydrogen produced, allowing for minimal emissions. Fuel-cell buses were chosen by Lewis County Transit after cost and emissions comparisons with other technologies. "This demonstrates how hydrogen can be produced and distributed sustainably to meet public transportation needs," a spokesperson said. [Full Story](#)

Technology/Research / 技術/研究

September 1 - October 3, 2025

10/03/2025 - Topsoe to license technology for planned Texas blue methanol plant

2025年10月3日 トプソー社、テキサス州で計画中のブルーメタノールプラントに技術ライセンス供与へ

Topsoe has agreed to license its SynCOR autothermal reforming technology to Sandpiper Chemicals for a planned blue methanol plant in Texas, US. The plant is expected to reform natural gas into hydrogen-rich syngas, capture much of the CO₂, and use the hydrogen in that syngas to produce blue methanol for markets like shipping. Sandpiper said the facility will produce 3,000 tonnes of methanol per day. [Full Story](#)

Investments, Mergers, Acquisitions / 投資、合併、買

September 1 - October 3, 2025

09/24/2025 - Global Energy Partner Backs Max Power With \$5 Million to Target Natural Hydrogen Discovery in Saskatchewan

2025年9月24日 グローバル・エネルギー・パートナー、サスカチュワン州での天然水素探査を目的にマックス・パワー社に**500万ドル**を支援

MAX Power Mining Corp. (CSE: MAXX; OTC: MAXXF; FRANKFURT: 89N) (“MAX Power” or the “Company”) has arranged a non-brokered private placement (the “Offering”) of common shares with a leading conglomerate from a Southeast Asian nation (the “Corporate Investor”). The Corporate Investor is a well-established entity with extensive interests and expertise in the global energy sector and will acquire approximately 16% non-diluted ownership in MAX Power, based on the current share structure, through an initial investment of \$5 million (CDN) at \$0.30 per unit (a “Unit”). As part of the Offering, the Company and the Corporate Investor anticipate entering into an investor rights and shareholder agreement (the “Agreement”) pursuant to a standard investment license application in the area of origin of the Corporate Investor. The Agreement is expected to provide the Corporate Investor with the right to participate in future financings of the Company on a pro rata basis, as well as certain board observer rights, contingent on the Corporate Investor maintaining ownership of at least 10% of the outstanding shares of the Company. [Full Story](#)

9/08/2025 - Electric Hydrogen acquires Ambient Fuels; establishes global project financing capability with Generate Capital to expand co-development and financing solutions for customers

2025年9月8日 エレクトリック・ハイドロジェン社がアンビエント・フューエルズを買収、ジェネレート・キャピタルと提携し、共同開発および融資ソリューションを拡充したグローバルなプロジェクトファイナンス能力を確立

Electric Hydrogen, a U.S. manufacturer of advanced electrolyzers, today announced it has acquired Ambient Fuels, a leading hydrogen project developer. Rising demand for clean hydrogen in both the U.S. and E.U. is accelerating the already fast-growing market for U.S. technology. Adding Ambient Fuels’ deep development expertise and portfolio of U.S. project sites will expand Electric Hydrogen’s ability to partner with customers on co-development of hydrogen projects and provide dedicated capital resources where appropriate. As part of the transaction, Electric Hydrogen also entered into a strategic relationship with Generate Capital, a leading infrastructure investment platform and former investor in Ambient Fuels, to offer up to \$400 million in hydrogen project finance solutions around the globe. This complementary relationship combines Electric Hydrogen’s industry leading electrolyzer technology with project financing to create attractive offerings for customers seeking the lowest levelized cost of hydrogen (LCOH). The combination of project development expertise and financing also enables Electric Hydrogen to originate, buy and sell large-scale clean hydrogen projects. [Full Story](#)