

NORTH AMERICAN H2 NEWS BRIEF

北米水素業界ニュース概要



FEBRUARY 1-28, 2026

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

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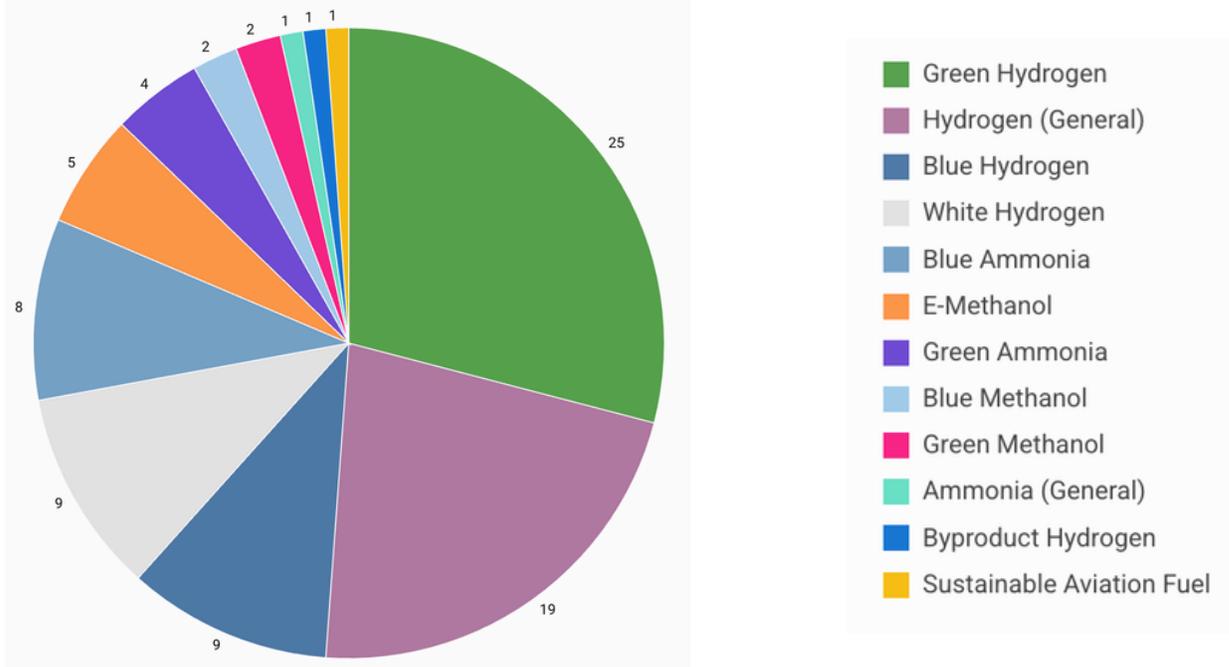
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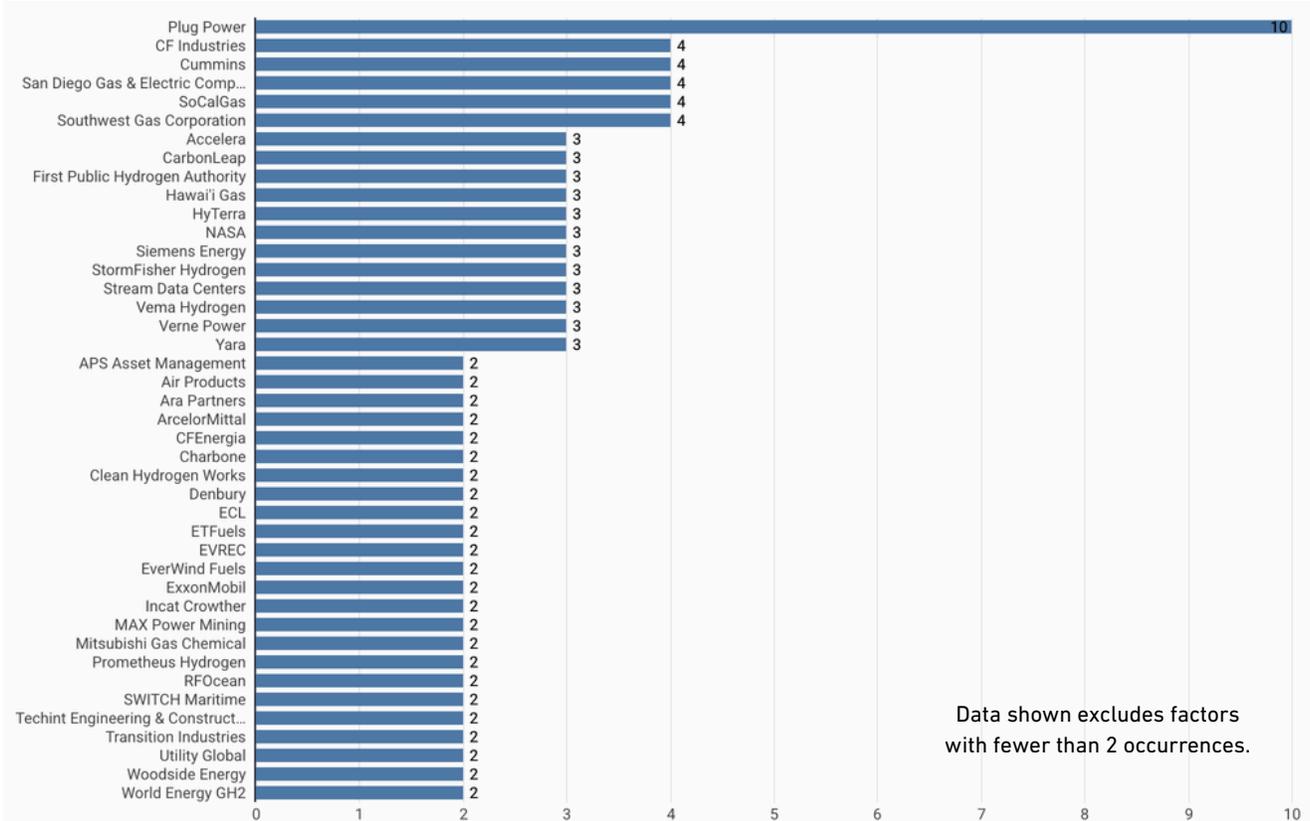
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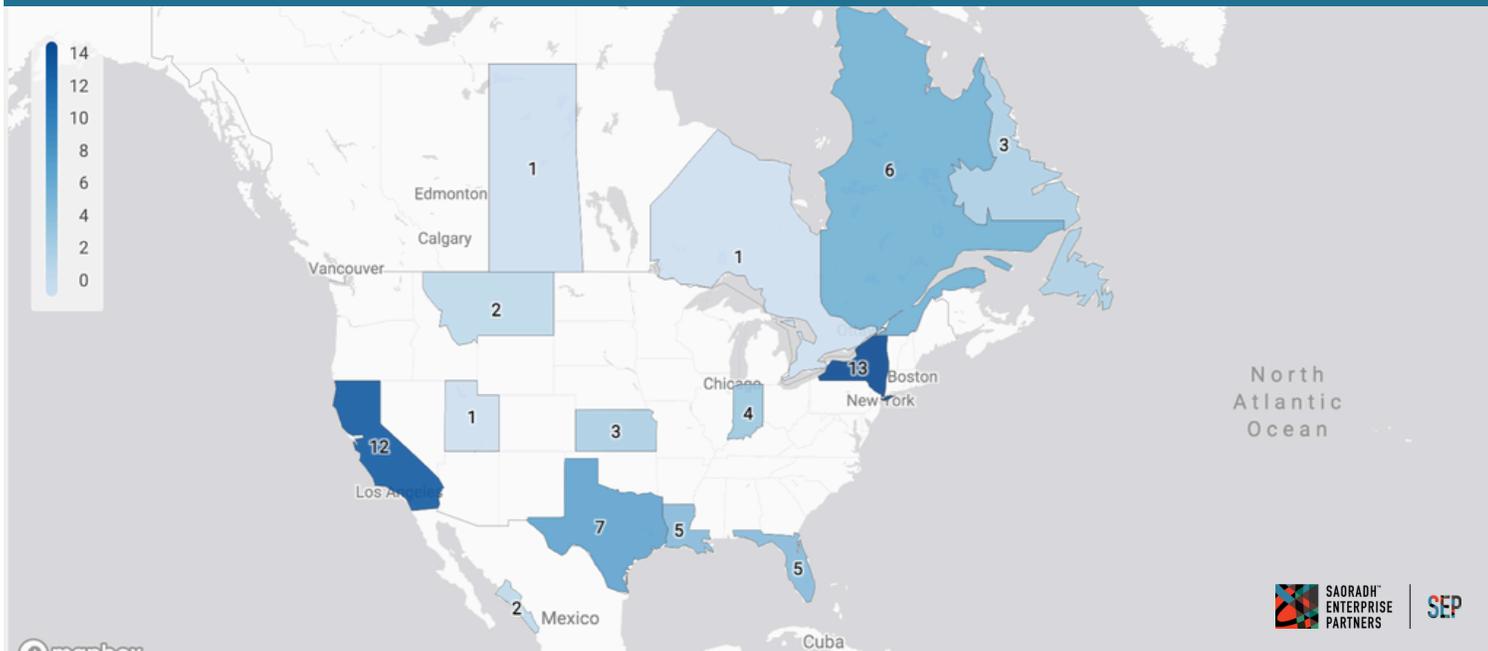


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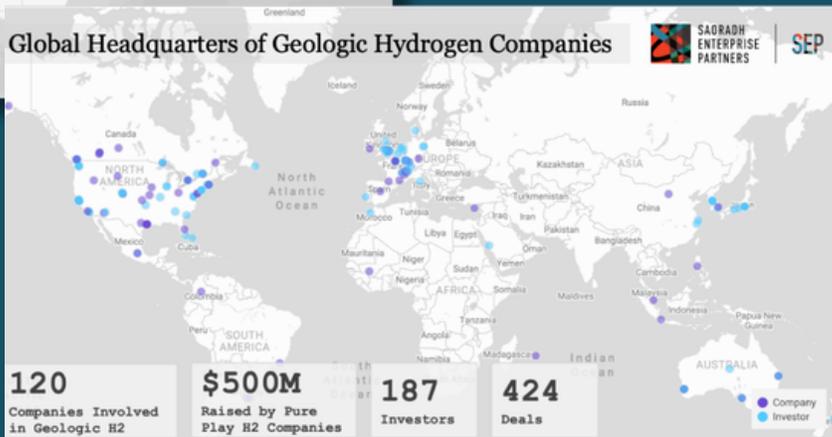
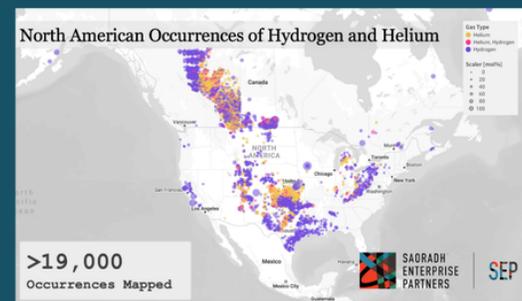


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North American Geologic Hydrogen Tracker / 北米天然水素追跡ツール



Analyst Note (February 1-28, 2026)

February brought a familiar mix of policy signals for the North American hydrogen sector. In the United States, California and twelve other states filed a lawsuit against the federal government seeking the release of previously approved clean energy funding, including up to \$1.2 billion designated for the ARCHES hydrogen hub and \$1 billion allocated to the Pacific Northwest hydrogen hub. At the same time, the **United States Hydrogen Alliance** announced a strategic shift in its advocacy efforts, indicating that it will prioritize engagement with state legislatures rather than federal policymakers in Washington, D.C. The group argued that the next phase of hydrogen market development is likely to be shaped primarily by state-level regulatory frameworks, permitting processes, and long-term policy commitments. In Canada, the government of Newfoundland and Labrador revoked Crown land reservations previously granted to three proposed green hydrogen projects led by **World Energy GH2**, **EverWind Fuels**, and the **Toqlukuti'k consortium** after developers failed to pay required land reserve fees. Provincial Energy Minister Lloyd Parrott said the decision reflects a view that global green hydrogen demand is expanding more slowly than earlier expectations suggested.

Adding to the uncertainty, potential revisions to Europe's Carbon Border Adjustment Mechanism (CBAM) have introduced another layer of risk for U.S. export-oriented projects. **Yara's** CFO called the suspension of CBAM "highly questionable" while acknowledging that political delays could complicate the company's plans to support **Air Products'** blue hydrogen and ammonia facility in Louisiana. Air Products, meanwhile, flagged rising construction costs, rather than CBAM itself, as the primary concern ahead of a potential final investment decision on that 1,700 tonne per day project later this year. These developments indicate that European demand mechanisms, once considered a stabilizing factor for U.S. hydrogen derivative exports, are now contributing to short-term market uncertainty.

This global policy uncertainty is increasingly reflected in large-scale project activity. **CF Industries** announced it will not move forward with a planned 20 MW green hydrogen project at its Donaldsonville facility, recording a \$51 million asset impairment. **Woodside Energy** cautioned that demand for low-carbon ammonia is expanding more slowly than expected, which could influence plans for increased CCS capacity at its new Beaumont, Texas ammonia plant, which started grey ammonia production in December.

Despite ongoing headwinds, the low-carbon fuels sector continues to demonstrate resilience. In February, several flagship projects advanced:

- **Transition Industries'** \$3.3 billion Pacifico Mexinol project in Sinaloa, Mexico secured a long-term natural gas supply agreement with state-owned **CFEnergía**, enabling construction of a facility designed to produce up to 1.8 million tonnes of blue methanol and 350,000 tonnes of green methanol annually.
- The 220 MW ACES Delta project in Utah, jointly developed by **Chevron New Energies** and **Mitsubishi Power**, approached completion, with all 40 **HydrogenPro** electrolyzers operating at full capacity. The project is set to convert and store up to 100 metric tons per day of green hydrogen in large salt caverns for dispatch to California's grid.

- **Montana Renewables** and **World Energy** announced a deal to supply over 70 million gallons of sustainable aviation fuel over the next three years, potentially reducing as much as 600,000 metric tons of CO2 emissions.
- Irish developer **ET Fuels** signed a binding long-term e-methanol offtake agreement with UK-based **RFOcean** for supply from its planned Texas facility starting in 2030.
- **StormFisher Hydrogen** partnered with **CarbonLeap** to connect its RFNBO-certified e-methanol with a book-and-claim model designed to help transatlantic cargo owners achieve Scope 3 emissions reductions.

Geologic hydrogen continued to make steady progress. **HyTerra** and **Prometheus Hydrogen** signed a collaboration agreement aimed at achieving the world's first natural hydrogen delivery, transporting hydrogen from a HyTerra-controlled U.S. well site through Prometheus's purification and delivery systems to an end user, with completion targeted by the end of 2026. HyTerra also advanced the production test design at its McCoy-1 well in Kansas, with equipment procurement underway ahead of a Q2 2026 start. In Canada, **Max Power Mining** readied plans to drill a second natural hydrogen well, "Bracken," along the Saskatchewan-Montana border, building on its successful Lawson discovery. **Vema Hydrogen** completed drilling of the world's first Engineered Mineral Hydrogen pilot wells in Quebec.

On the investment and corporate strategy front, several positive developments took shape. **Utility Global** closed a \$100 million Series D round, led by **Ara Partners** and **APG Asset Management**, to expand deployment of its H2Gen® technology for industrial decarbonization across the Americas, Europe, and Asia. **Plug Power** finalized a \$132.5 million agreement with **Stream Data Centers** for its Project Gateway site in New York, supporting a broader \$275 million liquidity initiative. Meanwhile, **SunHydrogen** signed a manufacturing partnership with **CTF Solar** to accelerate production of 1,000 full-size hydrogen panels, moving closer to commercial deployment.

Simultaneously, legal challenges and strategic adjustments highlighted ongoing pressures in parts of the hydrogen sector. Plug Power is facing a series of class action lawsuits alleging that the company "materially overstated" its claims related to its DOE loan. **Cummins** reported strong Q4 and full-year 2025 results but recorded charges tied to a strategic review of its electrolyzer operations within the **Accelera** segment, citing evolving expectations for hydrogen adoption. Meanwhile, **Clean Hydrogen Works** filed suit against **ExxonMobil**, claiming that Exxon's acquisition of Denbury and the subsequent loss of CO2 pipeline access disrupted financing and construction schedules for its Ascension Clean Energy blue ammonia project in Louisiana.

February reinforced the complexity and scale of opportunities in the hydrogen sector. Policy shifts in North America, evolving European demand mechanisms, and ongoing legal and strategic pressures highlight the uncertainty that companies must navigate. At the same time, the advancement of large-scale projects, innovations in geologic hydrogen, and targeted investment and partnership activity underscore the sector's resilience and long-term growth potential. As in previous months, binding offtake agreements and international decarbonization mandates remain the primary drivers of progress for North American hydrogen projects.

アナリストノート(2026年2月1日～28日)

2月は北米の水素産業にとってこれまでと同様、様々な政策動向が混在した月となりました。米国ではカリフォルニア州を含む13州が連邦政府を提訴し、既に承認済みのクリーンエネルギー資金の拠出を求めました。これにはカリフォルニア水素ハブ向けの最大12億ドル、およびパシフィック・ノースウェスト水素ハブに割り当てられた10億ドルが含まれます。同時に、米国水素連合はロビー活動における戦略的転換を発表し、ワシントンD.C.の連邦政策立案者よりも州議会への働きかけを優先する方針を表明しました。同団体は、水素市場開発の次の段階は、主に州レベルの規制枠組み、許認可プロセス、および長期的な政策取り組みによって形成される可能性が高いと主張しています。カナダでは、ニューファンドランド・ラブラドル州政府が、開発者が必要な土地保留料を支払わなかったため、ワールド・エナジーGH2、エバーウィンド・フューエルズ、およびトクルクティーク・コンソーシアムが主導する3つの計画中のグリーン水素プロジェクトに対して、以前付与していた国有地保留権を取り消しました。同州エネルギー担当大臣ロイド・パロット氏は、この決定は世界のグリーン水素需要の拡大が当初の予想よりも遅れているという見解を反映したものだとしています。

不確実性に拍車をかけているのが、欧州の炭素国境調整メカニズム(CBAM)の改正案が浮上したことで、米国における輸出志向型プロジェクトに新たなリスク要因をもたらしています。ヤラ社の最高財務責任者は、CBAMの適用延期を「極めて疑問視される」としつつも、政治的遅延がエア・プロダクツ社がルイジアナ州で進めるブルー水素・アンモニア施設への支援計画を複雑化する可能性を認めました。一方、エア・プロダクツは、日量1,700トンのプロジェクトに関する今年後半に予定されている最終投資判断を前に、CBAM自体ではなく建設コストの上昇を主な懸念事項として指摘しました。これらの動向は、かつて米国産水素派生商品輸出において安定要因と見なされていた欧州の需要メカニズムが、現在では短期的市場の不確実性に寄与していることを示しています。

この世界的な政策の不確実性は、大規模プロジェクトの活動にも反映されつつあります。CFインダストリーズは、ドナルドソンビル工場で計画していた20MWのグリーン水素プロジェクトを断念し、5,100万ドルの資産減損を計上しました。ウッドサイド・エナジーは、低炭素アンモニアの需要拡大が予想より遅れていると警告しており、昨年12月にグレーアンモニア生産を開始したテキサス州ボーモントの新工場におけるCCS能力の拡張計画に影響を与える可能性があります。

逆風が続く中でも、低炭素燃料セクターは堅調さを維持しています。2月には、いくつかの主要プロジェクトが進展しました。

- トランジション・インダストリーズがメキシコ・シナロア州で進める33億ドル規模のパシフィコ・メキシノールプロジェクトは、国営電力会社CFエナジアとの間で長期天然ガス供給契約を締結。これにより、年間最大180万トンのブルーメタノールと35万トンのグリーンメタノールを生産する施設の建設が可能となりました。
- シェブロン・ニュー・エナジーと三菱パワーが共同開発するユタ州の220 MW 規模のACESデルタプロジェクトが完成に近づき、40基のハイドロジェン・プロ社の電解装置がフル稼働しました。1日あたり最大100トンのグリーン水素を製造して巨大な岩塩空洞に貯蔵し、カリフォルニア州の送電網に供給する計画です。

- モンタナ・リニューアブルズとワールド・エナジーは、今後3年間で7,000万ガロン以上の持続可能な航空燃料(SAF)を供給する契約を発表。これにより最大60万トンのCO2排出量削減が見込まれます。
- アイルランドの開発業者ETフューエルズは、英国拠点のRFオーシャンと、2030年から開始するテキサス州に計画中の施設からの供給に関する法的拘束力のある長期e-メタノール購入契約を締結しました。
- ストームフィッシャー・ハイドロジェンはカーボンリープと提携し、自社のRFNBO認証を取得したe-メタノールと「ブック・アンド・クレーム」モデルを統合。大西洋横断航路の荷主によるスコープ3排出量削減を支援します。

天然水素事業も着実な進展を続けています。ハイテラとプロメテウス・ハイドロジェンは、世界初の天然水素供給実現に向けた協力協定を締結しました。ハイテラが管理する米国内の井戸から採取した水素を、プロメテウスの精製・供給システムを通じてエンドユーザーへ届ける計画で、2026年末までの完了を目指しています。ハイテラはカンザス州のマッコイ1号井戸における生産試験設計も進め、2026年第2四半期の開始に向け設備調達を進めています。カナダでは、マックス・パワー・マイニング社がローソンでの発見成功を受け、サスカチュワン州とモンタナ州の国境沿いで2本目の天然水素井戸「ブラッケン」の掘削計画を進めています。一方、ヴェマ・ハイドロジェンはケベック州において、世界初のエンジニアード・ミネラル水素のパイロット井戸の掘削を完了しました。

投資および企業戦略の面でも、いくつかの前向きな進展が見られました。ユーティリティ・グローバルは、アラ・パートナーズとAPGアセット・マネジメントが主導するシリーズDラウンドで1億ドルを調達し、産業脱炭素化技術「H2Gen®」の米州・欧州・アジア地域における展開拡大を図ります。プラグ・パワーは、ニューヨーク州のプロジェクト・ゲートウェイ用地に関してストリーム・データ・センターズと1億3,250万ドルの契約を締結し、総額2億7,500万ドルの流動性向上策を推進しています。一方、サンハイドロジェンはCTFソーラーと製造提携を結び、フルサイズ水素パネル1000枚の生産加速を図り、商業展開に一步近づきました。

同時に、法的な課題や戦略的調整が水素セクターの一部で継続する圧力を浮き彫りにしました。プラグ・パワーは、同社のエネルギー省(DOE)資金支援に関連する主張に「著しい過大評価」があったとして、一連の集団訴訟に直面しています。カミンズは、2025年第4四半期および通年の好調な業績を報告しましたが、水素導入に対する期待の変化を理由に、アクセラ部門における電解装置事業の戦略的見直しに関連する費用を計上しました。一方、クリーン・ハイドロジェン・ワークスはエクソンモービルを提訴し、同社がデンバリーを買収したことでCO2パイプラインへのアクセスが失われ、ルイジアナ州におけるアセンション・クリーン・エナジー・ブルーアンモニアプロジェクトの資金調達と建設スケジュールが妨げられたと主張しています。

2月の動向は、水素セクターにおける機会の複雑さと規模をさらに浮き彫りにしました。北米の政策転換、変化する欧州の需要メカニズム、そして継続的な法的・戦略的圧力は、企業が対処しなければならない不確実性を示しています。同時に、大規模プロジェクトの進展、天然水素技術における革新、そして的を絞った投資とパートナーシップ活動は、このセクターの強靱性と長期的な成長ポテンシャルを裏付けています。過去数ヶ月と同様に、法的拘束力のあるオフテイク契約と国際的な脱炭素化の義務付けが、北米の水素プロジェクトを推進する主要な原動力であり続けています。

Policies / 政策

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2/20/2026 - Newfoundland strips Crown Land reserves from three green hydrogen projects

2026年2月20日 ニューファンドランド州、3つのグリーン水素プロジェクトから公有地留保権はく奪
Three major wind-to-green hydrogen projects in Newfoundland and Labrador have been stripped of their Crown Land reserves for failing to pay land reserve fees. A fourth project will continue moving forward. The update came from the Canadian province's Energy Minister Lloyd Parrott, whose office said the global green hydrogen market was "growing more slowly than expected." The stripped reserves are related to World Energy GH2's 1.2GW green ammonia project, EverWind Fuels' Burin Peninsula green fuels project, and the Toqlukuti'k project being undertaken by ABO Wind, Braya Renewable Fuels, and Miawpukek First Nation. [Full Story](#)

2/18/2026 - US states sue Trump administration to unlock funding for clean energy projects

2026年2月18日 米国諸州、クリーンエネルギー事業資金の凍結解除を求めトランプ政権を提訴
California and a dozen other states are suing the federal government to force it to pay out grants approved by Congress for clean energy projects, the California attorney general's office said on Wednesday. The Trump administration terminated some funding allocated under environmentally focused laws, including the Inflation Reduction Act, reflecting a broad effort to check support for wind, solar and other fossil-free power sources while prioritizing increased U.S. oil production. The new suit responds in part to California's loss of \$1.2 billion in federal funding for the Alliance for Renewable Clean Hydrogen Energy Systems, or ARCHES, Bonta said. The hydrogen plan was intended to replace fossil fuels in utilities, public transit, trucking and ports. Thirteen states in total are suing, among them Colorado, Connecticut, Illinois, New Jersey, New York, Oregon and Washington, the filing showed. [Full Story](#)

2/12/2026 - Yara doubts CBAM suspension as delays threaten US blue ammonia plans

2026年2月12日 ヤラ社、CBAM停止に懐疑的 遅延が米国のブルーアンモニア計画の脅威に
Fertiliser major Yara doubts the EU will suspend its new carbon border tax on imports, but warns political delays could complicate its plans to back a major US blue hydrogen ammonia project. Speaking during the firm's earnings call, CFO Magnus Ankarstrand said it was "highly questionable" whether any changes would be made to the EU's carbon border adjustment mechanism (CBAM). Having come into force in January to cover fertilisers, steel and more, CBAM places a carbon price on goods imported into the EU. However, several EU member states have been calling on Brussels to remove fertilisers from the scheme, warning it would drive up prices for farmers. [Full Story](#)

2/09/2026 - US hydrogen trade group shifts attention to state policymakers

2026年2月9日 米国水素業界団体、州レベルの政策立案者に重点をシフト

The United States Hydrogen Alliance plans to focus its lobbying efforts on building state-level support, rather than targeting federal policymakers. The group argued that the next phase of hydrogen market growth will be driven by individual state policies. The shift comes amid a rollback of federal clean energy support after the first year of Donald Trump's second term, which has seen flagship incentives shortened and funding for regional hydrogen hubs removed. USHA said states that move fast to establish regulatory frameworks, permitting, and long-term policy signals will be best positioned to attract hydrogen investment. [Full Story](#)

2/04/2026 - SoCalGas Petitions CPUC to Update Hydrogen Blending Demonstration Requirements Based on Global Safety History and Research

2026年2月4日 南カリフォルニアガス会社、世界の安全実績と研究に基づいた水素混入実証要件の更新をCPUCに要請

Southern California Gas Co. (SoCalGas), along with San Diego Gas & Electric Company and Southwest Gas Corporation, on Tuesday submitted a petition to the California Public Utilities Commission (CPUC) to modify a 2022 decision ordering the California investor-owned gas utilities (IOUs) to develop a demonstration project blending up to 5% hydrogen into natural gas prior to recommending a systemwide clean renewable hydrogen injection standard for medium pressure distribution systems. Because the safety case for low-level blends has been advanced since the CPUC's order, the utilities are asking the agency to remove the requirement to develop the 5% demonstration projects before recommending a systemwide blending standard. The petition does not change the CPUC's requirement for utilities to develop demonstration projects studying blends in the 5%–20% range, which remain an important part of California's long-term decarbonization planning. Since 2022, a significant body of new research, operational data, and real-world experience has emerged. Utilities in America – including in California – and around the world have already demonstrated that blending up to 5% hydrogen into existing natural gas systems can be done safely, reliably, and without modifying customer appliances.

[Full Story](#)

2/04/2026 - Clean Hydrogen Works Takes ExxonMobil To Court Over CO2 Pipeline Access

2026年2月4日 クリーン・ハイドロジェン・ワークス、CO2パイプライン利用を巡りエクソンモービルを提訴

Clean Hydrogen Works (CHW), a developer of low-carbon ammonia projects, has launched legal action against ExxonMobil, accusing the energy major of abusing its control over critical carbon dioxide transport infrastructure to squeeze out competition along the US Gulf Coast. The lawsuit, filed in a Texas business court, centers on Exxon's ownership of Denbury Carbon Solutions, acquired in 2023 for \$4.9 billion. Prior to the acquisition, CHW had secured access to Denbury's nearly 620-mile CO2 pipeline network, which is a key component of its Ascension Clean Energy blue ammonia project in Louisiana. According to court filings, that access was later revoked, undermining project financing, customer agreements and construction timelines. CHW claims Denbury had previously committed to building a dedicated pipeline spur linking the

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Ascension site to the main trunkline and had invested \$20 million into the project. In early 2025, however, Denbury allegedly terminated contracts, accused CHW of delays and demanded repayment of its investment – a move the startup says only occurred after Exxon assumed control. [Full Story](#)

Projects / プロジェクト

February 1 - 28, 2026

2/27/2026 - HyTerra and Prometheus Hydrogen Sign Deal for World's First Purified Natural Hydrogen Delivery

2026年2月27日 ハイテラとプロメテウス・ハイドロジェン、世界初の精製天然水素の供給契約を締結

The Collaboration Agreement brings together HyTerra's geologic hydrogen expertise with Prometheus Hydrogen's proprietary purification and downstream hydrogen storage, transport and delivery technologies. HyTerra will supply raw gas containing geologic hydrogen from a HyTerra-controlled well site in the US. Prometheus Hydrogen will purify, store, transport and deliver the hydrogen to an end user within the United States. The Demonstration is targeting completion by the end of 2026 and is designed to validate an integrated geologic hydrogen value chain, from subsurface production through to delivery to a customer. It is expected to represent one of the first end-to-end demonstrations of production and delivery of geologic hydrogen to an end user in the United States. [Full Story](#)

2/27/2026 - HydrogenPro's 220MW ACES Delta Project Nears Completion with All 40 Electrolyzers Installed

2026年2月27日 ハイドロジェンプロ、全40基の電解装置設置完了で220MW ACES デルタプロジェクト竣工間近

The 220 MW ACES project in Utah, US, where HydrogenPro is exclusive supplier of electrolyzers, is nearing completion. This project is one of the world's largest renewable hydrogen projects and is expected to have a significant impact on the power supply in California. This was stated as HydrogenPro provided an update on the commissioning of its electrolyzer delivery to ACES in Utah in connection with the presentation of its Q4 results. All 40 HydrogenPro electrolyzers have operated at 100% load across all units. The Advanced Clean Energy Storage Hub (ACES Delta) is jointly developed by Chevron New Energies Company and Mitsubishi Power. It is an industry and utility-scale energy project that will produce, store, and deliver green hydrogen. This project is designed to convert and store up to 100 metric tons per day of green hydrogen, which will be stored in two huge salt caverns, each with a capacity of 150 gigawatt hours (GWh) of energy for dispatch back to the grid when needed.

[Full Story](#)

2/26/2026 - Plug Power Executes \$132.5 Million Definitive Agreement with Stream Data Centers as First Step in \$275 Million Strategic Infrastructure Optimization Initiative

2026年2月26日 プラグパワー、2億7,500万ドル規模のインフラ最適化戦略の第1段階として、ストリーム・データ・センターズと1億3,250万ドルの最終契約を締結

Plug Power Inc. announced it has entered into a definitive agreement with Stream Data Centers, a time-tested hyperscale data center developer and operator with over 25 years of experience delivering high performance compute. The agreement advances Plug's previously announced initiative to generate more than \$275 million in liquidity improvement through a combination of asset monetization, release of restricted cash, and reduced maintenance expenses. Under the executed agreement, Plug expects to receive gross proceeds of at least \$132.5 million, with total proceeds of up to \$142 million depending on the timing of closing and certain asset-removal conditions. The transaction includes Plug's interest in the Project Gateway site in New York, comprising the land and associated infrastructure, select substation-related assets, and the assignment of certain related agreements.

[Full Story](#)

2/24/2026 - Woodside weighs Beaumont CCS expansion as blue ammonia demand trails

2026年2月24日 ウッドサイド・エナジー、ブルーアンモニア需要の停滞を受けボーモントCCS拡張を再検討

Woodside Energy has warned that demand for low-carbon hydrogen-based ammonia is growing more slowly than expected, potentially affecting plans to expand carbon capture capacity at its new Texas facility. Speaking during the company's Q4 2025 earnings call, Acting CEO and Chief Operating Officer of Australia, Elizabeth Westcott, said the firm would align its project's carbon capture expansion with market demand. It comes after OCI Global started producing grey ammonia at the Beaumont New Ammonia plant in December, ahead of carbon capture and storage (CCS) technology being brought online and handing the site over to Woodside. [Full](#)

[Story](#)

2/24/2026 - ET Fuels secures bunkering buyer for Texas e-methanol

2026年2月24日 ET フューエルズ、テキサス州のe-メタノール供給先を確保

Irish project developer ET Fuels signed a binding long-term offtake agreement to supply e-methanol "at a fixed price" to UK-based shipping company RFOcean from 2030. The supply will come from ET Fuels' most advanced project in the US, the Rattlesnake Gap plant in Texas that will produce 120,000 t/yr of e-methanol. Neither company disclosed the amount involved, but ET Fuels said it will "still have volumes to sell for any other early movers." "Compliant fuel will be scarce," he said. "By locking in supply now at fixed prices, we can offer our customers certainty" of fuel supply that meets requirements under FuelEU Maritime. This is RFOcean's first e-fuel procurement agreement. The multiplier applied for use of non-carbon fuels from 2030-34 gives "a big incentive" to shipping companies to secure e-fuels, Rye-Florentz said. [Full Story](#)

2/19/2026 - CF writes off \$51m on scrapped green hydrogen project, backs blue ammonia

2026年2月19日 CF インダストリーズ、中止したグリーン水素プロジェクトで**5,100**万ドルを減損計上、ブルーアンモニアに注力

CF Industries has confirmed it will not proceed with its planned green hydrogen project as it focuses on economically attractive US blue ammonia production. The company logged a \$51m asset impairment related to a 20MW green hydrogen plant at its Louisiana ammonia complex. The fertiliser major had unveiled plans to install the alkaline electrolyser unit at its Donaldsonville site in 2021 to supply existing ammonia synthesis loops and produce up to 20,000 tonnes of green ammonia per year. [Full Story](#)

2/19/2026 - Montana Renewables and World Energy Join Forces to Drive Efficiency and Scale in Sustainable Aviation Fuel (SAF) Deliveries

2026年2月19日 モンタナ・リニューアブルズとワールド・エナジー、持続可能な航空燃料 (SAF) 供給の効率化と規模拡大に向け提携

Montana Renewables, LLC (MRL) and World Energy Clean Fuels LLC (World Energy) today announced a Sustainable Aviation Fuel (SAF) agreement that will deliver more than 70 million gallons of SAF to the market over three years, reducing as much as 600,000 MT of CO2 emissions while strengthening the American economy, supporting the agricultural community, and bolstering domestic energy independence. MRL is an unrestricted subsidiary of Calumet, Inc. (NASDAQ: CLMT). This collaboration combines the strengths of each company to move the American SAF industry forward at a pivotal moment. MRL is one of the largest SAF producers in North America and is set to significantly increase SAF production capacity with its MaxSAF™ 150 expansion. [Full Story](#)

2/18/2026 - HyTerra Advances McCoy-1 Testing to Assess Hydrogen and Helium Flow at Nemaha Project

2026年2月18日 ハイテラ、ネマハプロジェクトにおける水素・ヘリウム流量評価のためマッコイ-1井戸試験を推進

HyTerra Limited has advanced its Nemaha programme by finalising the design for a production test at the McCoy-1 well, aimed at evaluating hydrogen and helium flow characteristics and concentrations. The company says equipment procurement is under way ahead of a planned Q2 2026 start, and that the test will focus on the basement section of the well to support drilling decisions across its remaining leases. [Full Story](#)

2/16/2026 - \$3.3bn blue and green methanol project in Mexico cleared for construction

2026年2月16日 メキシコの**33**億ドル規模のブルー・グリーンメタノールプロジェクトが建設許可を取得

Construction is set to begin on a \$3.3bn green and blue hydrogen-based methanol project in Mexico after it secured supplies of natural gas. Transition Industries signed a long-term natural gas supply contract with state-owned CF Energía for its Pacifico Mexinol project, which is set to produce up to 1.8 million tonnes of blue methanol and 350,000 tonnes of green methanol annually. Around 160 million cubic feet per day of US natural gas will be supplied to the project,

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to fuel the methane reforming paired with carbon capture that would feed the blue methanol portion of the project. [Full Story](#)

2/11/2026 - CTF Solar and SunHydrogen Sign Agreement to Accelerate Hydrogen Panel Manufacturing

2026年2月11日 CTF ソーラー社、水素パネル製造加速に向けた合意

SunHydrogen, Inc. (OTCQB: HYSR), the developer of a breakthrough technology that produces renewable hydrogen using only sunlight and water, today announced the signing of a Technology and Manufacturing Services agreement with CTF Solar GmbH, a subsidiary of China National Building Materials Group (CNBM). The agreement is designed to accelerate the industrialization of SunHydrogen's proprietary hydrogen panel technology by rapidly converting pilot data and recent process learnings into a controlled manufacturing workflow. This partnership is designed to fast-track the transition from pilot-scale to production-scale, with the near-term goal of producing 1,000 full size 1.92 m² hydrogen modules, laying the groundwork for commercial deployment. [Full Story](#)

2/10/2026 - Florida to consider Linde plant expansion to meet rising US space demand

2026年2月10日 - フロリダ州、米国宇宙関連需要の増大受けリンデ工場拡張を検討

Brevard County Commission in eastern Florida is to consider the expansion of a Linde plant to meet rising demand for liquid oxygen and other gases to fuel SpaceX and NASA programs. The Commission will today [10 February] consider a temporary use agreement to let a nearby property serve as a construction staging area for the expansion, according to a report in Florida Today. The agenda includes a public hearing for the agreement to provide a temporary 'laydown site' for the Linde/Praxair plant expansion. Linde is leasing nearby property owned by J&S Enterprises for a construction yard during the plant expansion, which will be used to store heavy construction equipment and materials and for worker parking while they upgrade their site about 600 feet to the north, the report states. The expansion work is expected to take up to three years. [Full Story](#)

2/10/2026 - StormFisher Hydrogen and CarbonLeap Partner to Unlock Scope 3 Reductions for Cargo Owners of Transatlantic Freight

2026年2月10日 ストームフィッシャー・ハイドロジェンとカーボンリープ・パートナー、大西洋横断貨物輸送の荷主向けスコープ3排出削減実現のための提携を締結

StormFisher Hydrogen Ltd. ("StormFisher") and CarbonLeap B.V. ("CarbonLeap") today announced a partnership to support Scope 3 emission reductions in transatlantic maritime logistics. The collaboration links StormFisher's Renewable Fuels of Non-Biological Origin (RFNBO)-certified e-Methanol with CarbonLeap's efforts to scale freight decarbonisation for European customers and transatlantic trade routes. The model bridges a long-standing gap by sharing the cost of switching from conventional marine fuels to e-Methanol between carriers and cargo owners. StormFisher's e-Methanol reduces lifecycle carbon intensity by more than 85%, while CarbonLeap's book-and-claim approach allows cargo owners to claim these benefits regardless of vessel or carrier, supporting sustainability strategies and lowering reported transport emissions. [Full Story](#)

2/3/2026 - Vema Hydrogen Drills Pilot Wells in Quebec for World's First Engineered Mineral Hydrogen Test Project

2026年2月3日 ヴェマ・ハイドロジェン、世界初のエンジニアード・ミネラル水素試験プロジェクトに向けケベック州でパイロット井戸を掘削

Vema Hydrogen, developer of a low-cost and clean hydrogen production technology - Engineered Mineral Hydrogen™, completed drilling its first two pilot wells in Quebec, marking the world's first Engineered Mineral Hydrogen™ pilot wells. The project represents a major step in testing Vema's approach at scale to produce clean, baseload hydrogen directly from subsurface rock formations. Across North America, rising industrial activity, electrification, and the rapid expansion of AI-driven data centers are putting unprecedented pressure on regional power systems. In the wake of this, Canada is searching for domestic sources of clean energy that can strengthen grid resilience and support long-term decarbonization goals. Vema Hydrogen has identified that Quebec's geology offers a unique opportunity to extract Engineered Mineral Hydrogen, which has the capacity to support the fast-growing e-fuel and clean mobility industries, providing shipping and air transport markets with low-cost and clean fuels. [Full Story](#)

2/02/2026 - Max Power prepares to drill second natural hydrogen well

2026年2月2日 マックス・パワー、2本目の天然水素井の掘削を準備

MAX Power Mining Corp. has announced that in parallel with the ongoing analytical testing, resource modelling, and resource estimation program at its Lawson Natural Hydrogen Discovery in the heart of the 475-km-long Genesis Trend, the Company has identified a robust target for near-term drilling of a second "play concept" for Natural Hydrogen in Saskatchewan. Licensing is underway to commence the "Bracken" well along the Saskatchewan-Montana border in February. With a Natural Hydrogen discovery now confirmed at Lawson, MAX Power is advancing toward potential commercialization while simultaneously testing additional play concepts across Saskatchewan. The Bracken well represents an important step in demonstrating basin-scale continuity, supporting the geological team's interpretation that Natural Hydrogen systems in Saskatchewan are repeatable and scalable across multiple trends.

[Full Story](#)

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2/11/2026 - ECL Unveils Power-Agnostic FlexGrid Data Center Platform for AI Inferencing Expansion

2026年2月11日 ECL社、AI推論の拡張を支える電源非依存型データ・センター・プラットフォーム「FlexGrid」を発表

ECL today announced ECL FlexGrid™, a new power-agnostic platform designed to unlock a global wave of AI at scale from massive training clusters to the inferencing edge by turning power-constrained sites into high-density, inference-ready facilities. FlexGrid enables operators to deploy GPU-rich capacity anywhere, including close to users and data sources, even where grid power and hydrogen are not readily available. FlexGrid leverages ECL's proprietary power conditioning system to intelligently combine multiple sources of energy ranging from grid power to hydrogen, natural gas, renewables and even diesel into a single, reliable AC or DC power feed for the data center. This allows customers to start with modest grid connections in the 2–10 MW range and scale to 20–25 MW of available capacity per edge site by layering in additional sources of power. [Full Story](#)

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2/17/2026 Utility Global Announces \$100 Million First Close of Series D Financing to Deploy its Economic Industrial Decarbonization Platform Globally

2026年2月17日 ユーティリティ・グローバル、経済産業脱炭素化プラットフォームのグローバル展開に向けたシリーズD資金調達で1億ドル確保を発表

Utility Global (“Utility”), a global economic industrial decarbonization company enabling practical solutions for hard-to-abate sectors, today announced a first close of \$100 million in its Series D financing round, led by Ara Partners and APG Asset Management (one of the world's largest pension investors on behalf of Dutch pension funds). This milestone financing will allow Utility to globally deploy its proprietary H2Gen® technology at industrial scale. The financing will accelerate Utility's growth, enabling the continued expansion of its manufacturing capabilities, the strengthening of its project delivery teams, and the advancement of multiple commercial deployments across the Americas, Europe, and Asia. The capital will support its recently announced strategic partnerships and project announcements with Kyocera, Symbio North America Corporation, Seongnam Municipal Government of Korea, Maas Energy Works and ArcelorMittal. Utility's focus remains on repeatable, economically viable solutions that integrate directly into industrial processes and enable near-term decarbonization at scale. [Full Story](#)

2/06/2026 Plug Power faces class action lawsuit for ‘materially overstating’ claims about DOE funding

2026年2月6日 プラグ・パワー、DOE資金支援に関する虚偽説明の疑いで集団訴訟に直面
Green hydrogen technology firm Plug Power has been hit with a slew of class action lawsuits accusing the firm of “materially overstating” claims regarding a US Department of Energy (DOE) loan. [Full Story](#)

2/05/2026 Cummins Reports Strong Fourth Quarter and Full-Year 2025 Results, Records Charges Associated with Electrolyzer Business Strategic Review

2026年2月5日 カミンズ、2025年第4四半期および通年の好調な業績を発表、電解装置事業の戦略的見直しに関連する費用を計上

“Cummins delivered strong operational results in the fourth quarter and full year despite continued weakness in North America truck markets. Our Distribution and Power Systems segments achieved record full-year sales and profitability as a result of disciplined execution and robust demand for data center backup power,” said Jennifer Rumsey, Chair and CEO of Cummins. “In the fourth quarter, we recorded charges related to our electrolyzer business within the Accelera segment, reflecting actions taken as part of a strategic review initiated in response to shifts in hydrogen adoption expectations. These decisions were aimed at streamlining operations and reducing ongoing costs in light of the weaker outlook for demand.” [Full Story](#)

2/02/2026 Construction costs overshadow CBAM risk for Air Products’ Louisiana hydrogen plans

2026年2月2日 建設コストがCBAMリスクを上回り、エア・プロダクツのルイジアナ州水素計画に影響

Air Products is more concerned about rising construction costs than uncertainty around Europe’s carbon border levy as it moves toward a final decision on the fate of its Louisiana blue hydrogen project later this year. Speaking after the company reported a 12% increase in Q1 operating income, CEO Eduardo Menezes told the investor call that it had a “high bar” for taking final investment decision (FID) on the 1,700-tonne project, which has had its future under question since last May. The company has been working to de-risk the development by handing off its ammonia production and carbon capture elements. [Full Story](#)