NORTH AMERICAN H2 NEWS BRIEF
北米水素業界ニュース概要

SAORADH™ ENTERPRISE PARTNERS

MAY 1-31, 2026

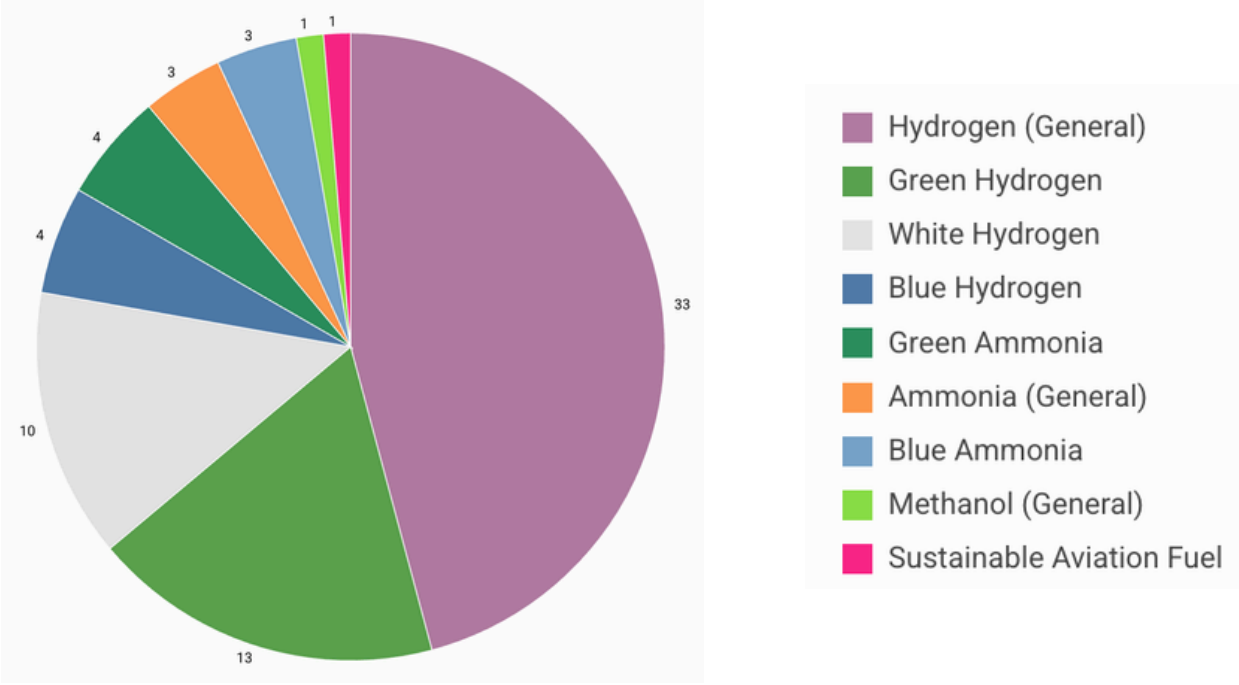
SEP's Curated H2 News, Insights, and Policy Updates for JETRO & JH2F Members

Table of Contents / 目次

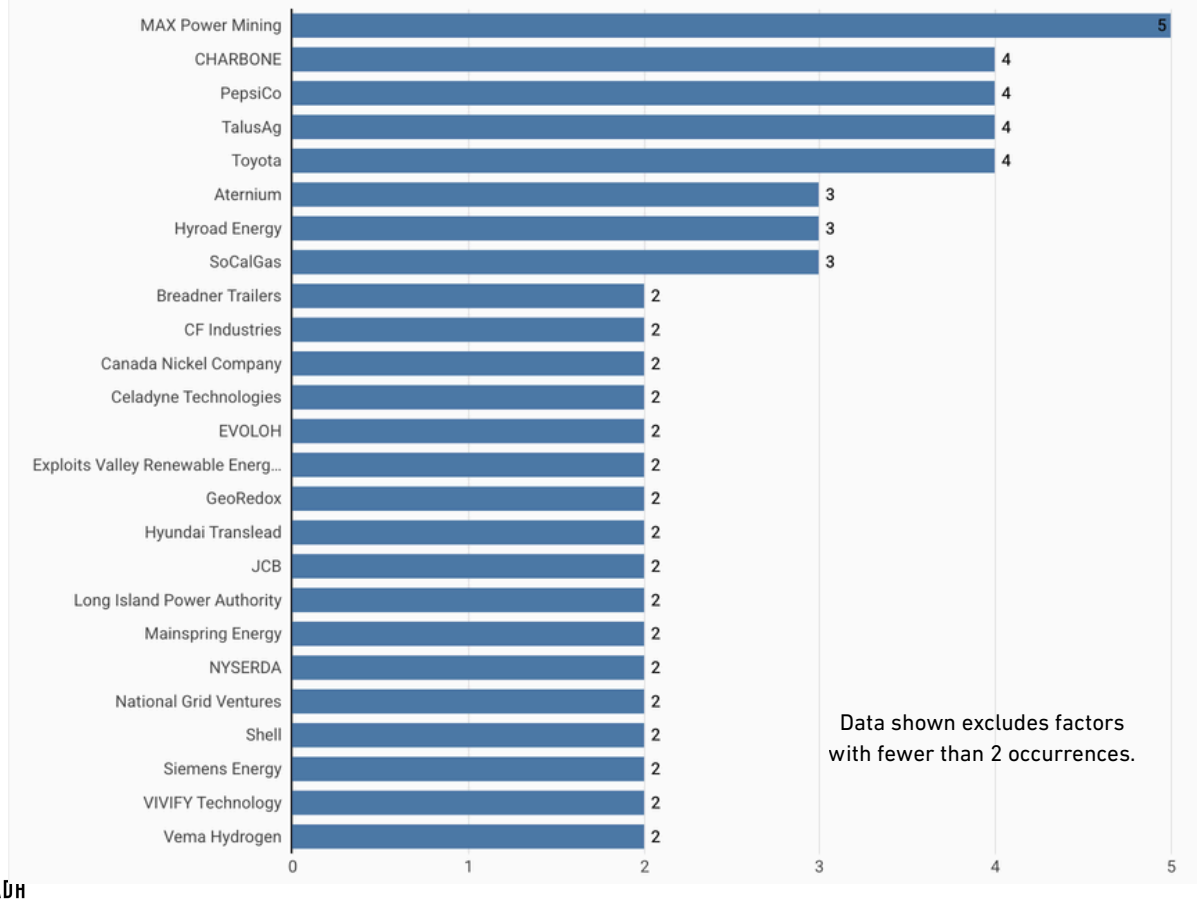
Alberta, Canada

Monthly News Statistics / 今月のニュース統計

News Count by Product / 製品別ニュース数

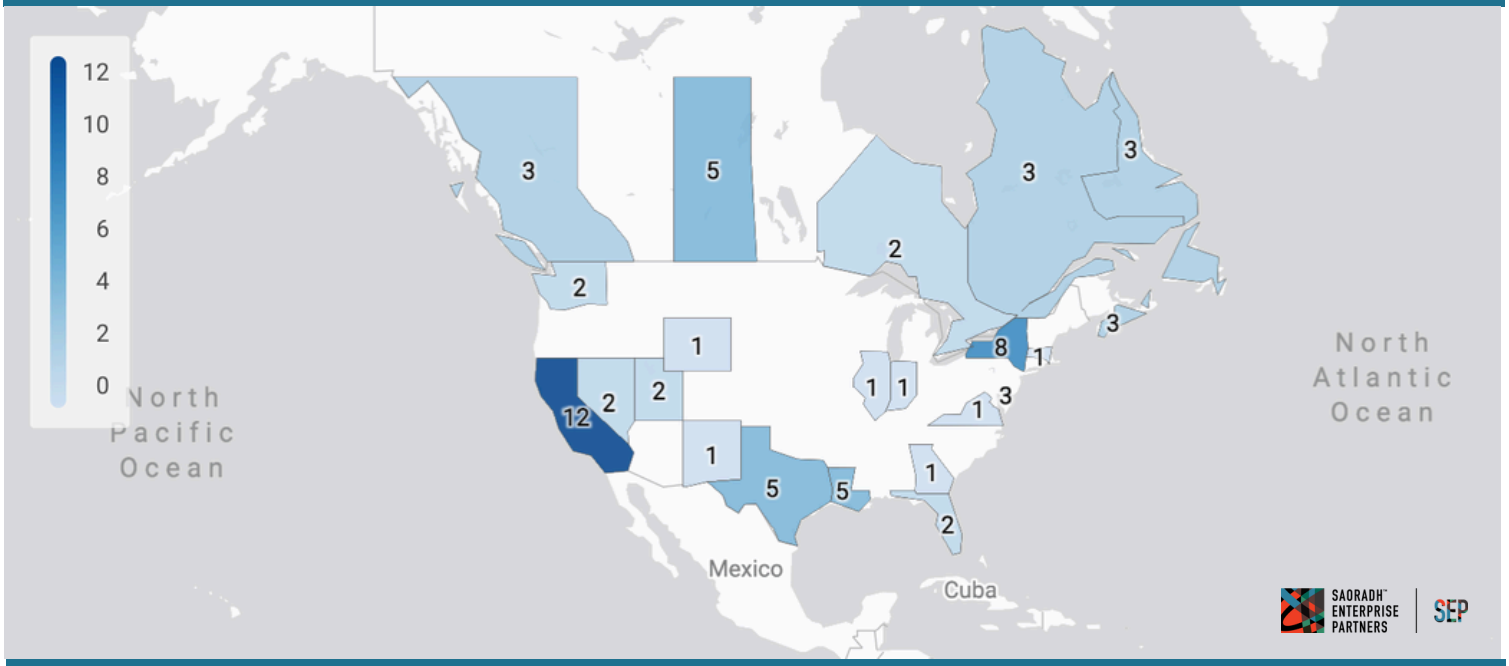


News Count by Company Name / 企業別ニュース数

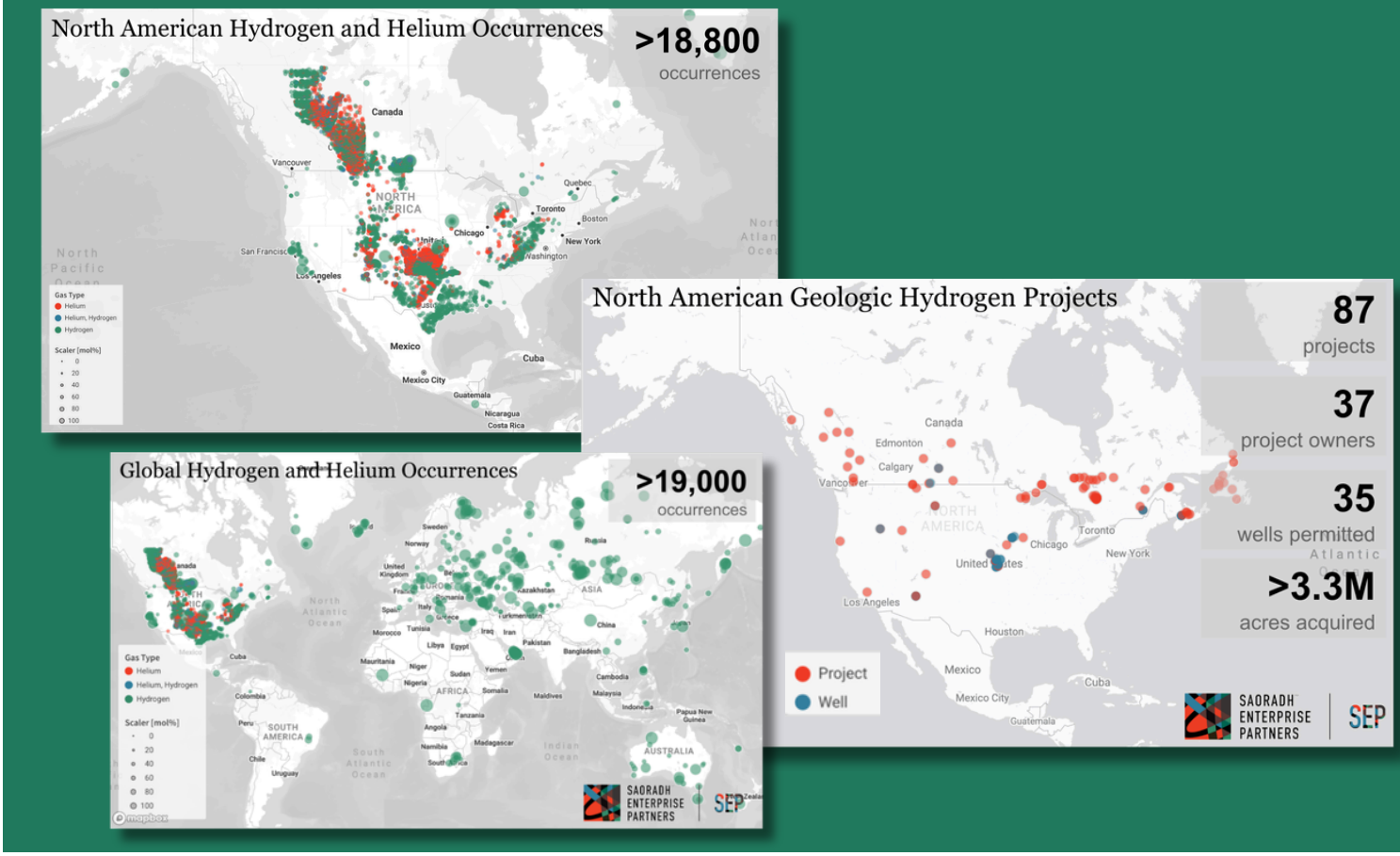


Monthly News Statistics / 今月のニュース統計

News Count by State or Province / 州別ニュース数



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



Analyst Note (May 1-31, 2026)

May demonstrated continued momentum in the North American hydrogen and renewable fuels space. Several of this month's most important stories centered around large-scale project advancements, geologic hydrogen developments, and decarbonized transportation deployments. While financing and commercialization challenges remain for portions of the market, several announcements demonstrated growing confidence in long-term demand for low-carbon fuels and derivatives.

Policy developments during May were few. The most notable exception came from the maritime sector where the **International Maritime Organization (IMO)** approved new safety guidelines for ammonia-fueled vessels. The decision provides a foundational regulatory framework for ammonia as a marine fuel and represents an important step toward broader adoption of ammonia in international shipping.

In North America, **Toyota**'s hydrogen fuel cell systems secured key U.S. and Canadian certifications for stationary power applications. While not a policy announcement in the traditional sense, the certifications remove an important commercialization barrier and could accelerate deployment of fuel-cell-based distributed power systems throughout the region. This is particularly important to the data center industry, as hyperscalers are struggling to get access to the energy required to power data centers. Stationary power and battery energy storage systems (BESS) will become increasingly important as grid strain intensifies and companies look for alternative energy pathways.

Project activity remained a dominant source of market momentum in May, with several announcements representing important milestones for hydrogen production, transportation, and industrial deployment. Canada, particularly Newfoundland and Labrador, continued to emerge as a leading hub for hydrogen and derivative fuel development, reflecting a policy and investment environment that has proven more conducive to project advancement than many jurisdictions in the United States.

- **CF Industries** confirmed that construction remains on track to begin this year for its Blue Point project in Louisiana.
- **Exploits Valley Renewable Energy Corporation (EVREC)** advanced its wind-to-hydrogen and ammonia project in Newfoundland through environmental permitting milestones.
- **HES International** and **North Atlantic** announced plans to establish a hydrogen export route from Newfoundland to Germany using liquid organic hydrogen carrier (LOHC) technology.
- **CHARBONE** and **Vema Hydrogen** announced plans to build a hydrogen production and distribution network in Quebec designed to reduce transportation costs and strengthen regional supply reliability.
- **EVOLOH** launched a commercial-scale hydrogen project at a 3M facility, demonstrating continued industrial interest in hydrogen deployment within existing manufacturing operations.
- **Hyundai-POSCO Louisiana Steel** selected technology provider **Danieli** for a hydrogen-ready steel manufacturing facility in Louisiana, signaling growing interest in hydrogen-enabled low-carbon steel production across North America.

Not all project developments were positive. California regulators denied **SoCalGas** permission to recover $266 million from customers to fund a proposed hydrogen pipeline network, underscoring ongoing scrutiny around hydrogen infrastructure economics and deployment strategies.

Geologic hydrogen continues to be a key driving force behind the North American hydrogen market. Most notably, **GeoRedox** and **Canada Nickel Company** launched a first-of-its-kind stimulated geologic hydrogen program in Ontario, while **MAX Power Mining** secured additional investment and municipal support from the City of Moose Jaw for its Saskatchewan natural hydrogen initiatives. **DiagnaMed Holdings** announced that it acquired the Colchester East Natural Hydrogen Project, consisting of 2,104 claims in Nova Scotia. The concentration of announcements across multiple provinces suggests that Canada is rapidly positioning itself as a leading jurisdiction for natural hydrogen exploration.

The transportation sector continued to provide some of the clearest examples of hydrogen deployment moving beyond pilot-scale demonstrations. ACT Expo, held in May every year, is North America's largest advanced fleet and commercial transportation technology event. At the event this year, a number of companies announced collaborations and demonstrated advanced hydrogen technologies.

- **Toyota** announced plans to operate 40 **Nikola** hydrogen fuel-cell trucks in California through its partnership with **Hyroad Energy**. This collaboration is one of the largest single deployments of hydrogen-fueled trucks in North America, and it anchors the heavy-duty hydrogen fueling infrastructure being built to support it.
- **Powertech Labs** unveiled a high-capacity hydrogen tube trailer capable of transporting more than one metric ton of hydrogen per trip.

Beyond ACT Expo, several notable vehicle announcements and technology developments occurred during the month.

- **Hyundai** introduced fuel-cell truck deployments in Canada through a collaboration with Breadner Trailers.
- **Shell** opened what it describes as the first U.S. pipeline-fed hydrogen fueling station for fuel-cell vehicles, representing an important step toward reducing hydrogen delivery costs and improving station reliability.
- **Hapag-Lloyd** signed a letter of intent to explore green methanol offtake from **Southern Energy Renewables**' planned $1.4 billion Louisiana production facility, reflecting continued momentum behind methanol as a low-carbon marine fuel.

Investment activity remained focused on enabling future supply growth and commercialization, particularly in the geologic hydrogen and fuel cell space. **MAX Power Mining** received an $18 million investment from a private investor to support its Saskatchewan drilling operations. **First Atlas Resources** raised $1.5 million to support its natural hydrogen exploration in Nova Scotia. These investments demonstrate growing confidence in the resource potential of geologic hydrogen. The University of Texas Seed Fund invested $250,000 in **Celadyne Technologies** to support the commercialization of advanced membrane technology for fuel cells. Improvements to membrane technology will enhance the durability, efficiency, and safety of future fuel cell stacks.

On the research and technology side, **Greentown Labs**, **Shell**, and **Technip Energies** launched the latest cohort of their Go Make innovation program, supporting startups developing technologies related to low-carbon fuels, catalysis, and alternative chemical production pathways. **SunHydrogen** successfully

installed its newly designed hydrogen modules at the University of Texas at Austin's Hydrogen ProtoHub. These new modules carry the company's latest catalyst integrations and coating improvements, which will enhance the performance of the modules which are designed to produce hydrogen from only sunlight and water. **Element One** announced a memorandum of understanding (MOU) with **Twin Sisters Olivine** to explore the viability of producing critical minerals and natural hydrogen from silicate materials. Element One plans to research the production of hydrogen as an in situ precursor to olivine mining, or as a co-production process. This month's strategic collaborations and research initiatives suggest that innovation efforts are increasingly concentrated on reducing costs, improving efficiency, and evolving practical deployment pathways.

This month's stories highlighted both the opportunities and challenges within the hydrogen, ammonia, and methanol industries.

Opportunities

- Natural hydrogen is attracting significant investment and exploration activity.
- Ammonia and methanol continue to lead commercialization efforts.
- Transportation remains a major near-term adoption market.
- Canada is strengthening its position as a hydrogen development hub.

Challenges

- Hydrogen infrastructure projects continue to face economic and regulatory scrutiny.
- Long-term success remains dependent on capital availability, supportive policy, and firm offtake agreements.
- Many major projects are advancing but have not yet reached final investment decisions.

Natural hydrogen, ammonia, methanol, and transportation applications generated the strongest momentum, while investment and regulatory developments continued to support long-term market growth. Moving forward, project financing, offtake agreements, and large-scale deployment milestones will remain key indicators of industry progress.

アナリストノート（**2026**年**5**月**1**～**31**日）

5月は、北米の水素・再生可能燃料分野において、引き続き勢いが持続していることが示されました。今月の最も重要なニュースのいくつかは、大規模プロジェクトの進展、天然水素の開発、そして脱炭素化された輸送手段の導入に焦点を当てたものでした。市場の一部では資金調達や商業化の課題が残っているものの、いくつかの発表からは、低炭素燃料およびその派生製品に対する長期的な需要への信頼が高まっていることがうかがえました。

5月の政策動向は目立った動きはありませんでした。唯一の特筆すべき動きは海運分野で見られ、国際海事機関（**IMO**）がアンモニア燃料船に関する新たな安全ガイドラインを承認しました。この決定は、船舶用燃料としてのアンモニアに関する基礎的な規制枠組みを提供するものであり、国際海運におけるアンモニアの普及に向けた重要な一歩と言えます。

また北米では、トヨタの水素燃料電池システムが、定置用電力用途において米国およびカナダの主要な認証を取得しました。これは従来の意味での政策発表ではないものの、この認証取得により商業化における大きな障壁が取り除かれ、同地域全体での燃料電池を用いた分散型電源システムの展開を加速させる可能性があります。これはデータセンターに必要な電力確保に苦慮しているハイパースケーラー各社にとって極めて重要な進

展です。電力網への負荷が高まり、企業が代替エネルギー源を模索する中で、定置用電力や蓄電池システム（BESS）の重要性は今後一層高まるでしょう。

5月も、水素の製造、輸送、および産業分野での導入において重要な節目となる発表が相次ぎ、市場の勢いを牽引しました。カナダ、特にニューファンドランド・ラブラドール州は、水素および派生燃料開発の主要な拠点としての地位を確立しつつあり、これは米国の多くの地域に比べてプロジェクトの推進により適した政策・投資環境が整っていることを反映しています。

- **CF**インダストリーズは、ルイジアナ州のブルーポイント・プロジェクトについて、年内の着工に向け、計画通りに進んでいることを確認しました。
- エクスプロイツ・バレー・リニューアブル・エナジー・コーポレーション（**EVREC**）は、ニューファンドランド州での風力発電・水素・アンモニアプロジェクトにおいて環境許認可に関する重要な段階をクリアし、事業を前進させました。
- **HES**インターナショナルとノース・アトランティックは、液体有機水素キャリア（LOHC）技術を活用し、ニューファンドランドからドイツへの水素輸出ルートを構築する計画を発表しました。
- シャルボーンとヴェマ・ハイドロジェンは、輸送コスト削減と地域の供給安定性の強化を目的とした、ケベック州における水素の製造・流通ネットワークを構築する計画を発表しました。
- エボロー（**EVOLOH**）は3Mの施設で商業規模の水素プロジェクトを開始し、既存の製造工程における水素導入に対する産業界の関心が引き続き高いことを証明しました。
- ヒュンダイ・ポスコ・ルイジアナ・スチールは、ルイジアナ州に建設予定の水素対応製鉄施設の技術提供業者としてダニエリを選定しました。北米全域で水素を活用した低炭素鉄鋼生産への関心が高まっていることを示唆しています。

一方で、すべてのプロジェクトの進展が順調とは言えません。カリフォルニア州の規制当局は、南カリフォルニア・ガス（SoCalGas）が提案した水素パイプライン網構築のための資金として、2億6,600万ドルを顧客に転嫁することを認めませんでした。これは、水素インフラの経済性や展開戦略をめぐる厳しい監視が続いていることを浮き彫りにしています。

天然水素は、北米の水素市場における主要な原動力であり続けています。特に注目すべきは、ジェオレドックスとカナダ・ニッケルがオンタリオ州で業界初となる地質刺激型水素開発プログラムを開始したこと、また、マックス・パワー・マイニングがサスカチュワン州での天然水素事業に対し、ムースジョー市からの支持と追加投資を獲得したことです。ディアグナメッド・ホールディングスは、ノバスコシア州にある2,104の鉱区からなる「コルチェスター・イースト天然水素プロジェクト」を取得したと発表しました。複数の州で相次ぐこうした発表は、カナダが天然水素探査の主要な拠点として急速に地位を確立しつつあることを示唆しています。

輸送部門は、水素利用が実証実験の段階を超えて進展していることを示す、最も明確な事例の一つであり続けています。毎年5月に開催される北米最大級の先進的な車両・商用輸送技術イベント、ACT Expoでは、今年は多くの企業が連携を発表し、先進的な水素技術の実演を公開しました。

- トヨタは、ハイロード・エナジーとの提携を通じて、カリフォルニア州で40台のニコラ製水素燃料電池トラックを運用する計画を発表。この提携は、北米水素燃料トラックの単一導入事例としては最大規模の一つであり、これを支えるために整備が進められている大型車両向け水素充填インフラの中核となるものです。
- パワーテック・ラボは、1回の輸送で1トンを超える水素を運搬できる大容量の水素チューブトレーラーを公開。

ACT Expo以外にも、今月は注目すべき車両の発表や技術開発がいくつか行われました。

- ヒュンダイは、ブレッドナー・トレーラーズとの提携により、カナダでの燃料電池トラックの導入を開始しました。
- シェルは、燃料電池車向けの米国初のパイプライン直結型水素ステーションを開設しました。これは、水素の輸送コスト削減とステーションの信頼性向上に向けた重要な一歩です。
- ハパグ・ロイドは、サザン・エナジー・リニューアブルズがルイジアナ州に建設を計画している14億ドル規模の生産施設から、グリーンメタノールの購入を検討するための基本合意書に署名しました。これは、低炭素船舶燃料としてのメタノールに対する関心が引き続き高まっていることを反映しています。

投資活動は、特に天然水素および燃料電池分野において、将来の供給拡大と商用化の実現に向けた取り組みに引き続き集中しています。マックス・パワー・マイニングは、サスカチュワン州での掘削事業を支援するため、個人投資家から1,800万ドルの出資を受けました。ファースト・アトラス・リソーシズは、ノバスコシア州における天然水素の探査を支援するため、150万ドルを調達しました。こうした投資は、天然水素の資源ポテンシャルに対する信頼の高まりを示しています。テキサス大学シードファンドは、燃料電池向けの先進的な膜技術の商業化を支援するため、セラダイン・テクノロジーズに25万ドルを出資しました。膜技術の改良により、将来の燃料電池スタックの耐久性、効率、および安全性が向上する見込みです。

研究・技術分野では、グリーンタウン・ラボズ、シェル、テクニップ・エナジーズが、低炭素燃料、触媒、および代替化学品製造プロセスに関連する技術を開発するスタートアップを支援する 「Go Make」イノベーション・プログラムの最新コホートを立ち上げました。サンハイドロジェンは、テキサス大学オースティン校の「ハイドロジェン・プロトハブ」に、自社が新たに設計した水素モジュールの設置を無事完了しました。これらの新しいモジュールには、同社の最新の触媒統合技術とコーティング改良が採用されており、太陽光と水のみから水素を生成するように設計されたモジュールの性能を向上させます。エレメント・ワンは、ケイ酸塩鉱物から重要鉱物および天然水素を生産する可能性を模索するため、ツイン・シスターズ・オリビンと覚書（MOU）を締結したと発表しました。エレメント・ワンは、オリビンの採掘現場での前工程として、あるいは並行生産プロセスとして、水素の生産に関する研究を行う計画です。今月の戦略的提携や研究イニシアチブを見ると、イノベーションへの取り組みは、コスト削減、効率化、そして実用化に向けた道筋の確立にますます重点が置かれていることがうかがえます。

今月の記事では、水素、アンモニア、メタノール産業における機会と課題の両方に焦点が当てられました。

機会
- 天然水素への大規模な投資と探査活動の活発化
- 商用化をリードするアンモニアおよびメタノール
- 短期的な導入市場として確立された輸送分野
- 水素開発のハブとしての地位を強固にするカナダ

課題
- 経済性と規制の監視対象であり続ける水素インフラプロジェクト
- 資本調達、支援政策、確定したオフテイク契約への依存
- 進展は見られるものの、最終的な投資決定（FID）には至っていない主要プロジェクトの多さ

天然水素、アンモニア、メタノール、および輸送分野での用途が最も大きな勢いを見せ、一方で投資や規制面の進展が長期的な市場成長を支え続けています。今後も、プロジェクトファイナンス、販売契約、および大規模導入の進展が、業界の進捗を測る重要な指標となるでしょう。

News Stories / 主要ニュース一覧

Policies / 政策

May 1-31, 2026

5/26/2026 - IMO approves new safety guidelines for ammonia-fueled ships
2026年5月26日　IMO、アンモニア燃料船の新たな安全指針を承認
The International Maritime Organization (IMO) has approved the new safety guidelines for the use of ammonia as fuel on gas carriers, providing a practical framework to manage the associated safety risks, particularly its toxicity and handling requirements. The guidelines were developed through collaboration between Lloyd's Register (LR), the Belgian Federal Public Service Mobility and Transport (FPS Mobility) and gas shipping operator EXMAR and were approved at IMO's Maritime Safety Committee (MSC 111). **Full Story**

5/01/2026 - Toyota fuel cells secure North America certification as it eyes stationary uses
2026年5月1日　トヨタの燃料電池、定置用需要を視野に北米認証を取得
Toyota Hydrogen Solutions has obtained two key safety certifications for its stationary hydrogen fuel cells in the United States, a development the company says will reduce the cost and complexity of commercial adoption. **Full Story**

Projects / プロジェクト

May 1-31, 2026

5/28/2026 - Aternium targets Q1 2027 break-ground date for US hydrogen, heavy water plant
2026年5月28日　アテルニウム、米国で水素・重水プラントの着工を2027年第1四半期に予定
US start-up Aternium expects to begin construction of its 60MW hydrogen and heavy water project in the US Mid-Atlantic by early 2027 after naming engineering firm CH-IV as Owner's Engineer. Aternium said it expects to break ground on the Delaware site by Q1 2027, which would allow the project to qualify for the lucrative 45V clean hydrogen production tax credits. **Full Story**

5/21/2026 - Canadian hydrogen is to be transported to Wilhelmshaven via LOHC
2026年5月21日　カナダ産水素、LOHC技術を用いてヴィルヘルムスハーフェンへ輸送予定
HES International and the Canadian energy company North Atlantic aim to jointly establish an import route for hydrogen via the port of Wilhelmshaven. The basis will be LOHC technology.

Both companies signed a Memorandum of Understanding in Berlin. The partners are relying on Liquid Organic Hydrogen Carriers (LOHC). This technology enables the transport and storage of hydrogen in liquid form using existing infrastructure for liquid goods. According to North Atlantic, they plan to produce hydrogen in Newfoundland and Labrador based on renewable wind energy and export it to Europe. **Full Story**

5/20/2026 - GeoRedox and Canada Nickel Launch First-of-its-kind Geologic Hydrogen Program at Crawford Nickel Project in Timmins, Ontario
2026年5月20日　ジオレドックス社とカナダ・ニッケル社、オンタリオ州ティミンズのクロフォード・ニッケル・プロジェクトにおいて、世界初となる天然水素プログラムを開始
GeoRedox and Canada Nickel Company Inc. have signed a Memorandum of Understanding (MoU) launching a partnership to develop the world's first stimulated geologic hydrogen well on the site of Canada Nickel's Crawford Nickel Project near Timmins, Ontario. **Full Story**

5/19/2026 - ERVEC advances green hydrogen and ammonia project
2026年5月19日　EVREC、グリーン水素・アンモニアプロジェクトを推進
Exploits Valley Renewable Energy Corp. (EVREC) has announced the filing of the Environmental Impact Statement (EIS) for its project in Central Newfoundland, a significant milestone in the development of one of Canada's most advanced wind-to-green hydrogen and ammonia initiatives. **Full Story**

5/19/2026 - CHARBONE and Vema Hydrogen Build Quebec Hydrogen Supply Chain to Meet Wellhead-to-Industrial Gas Demand and Reduce Transport Costs
2026年5月19日　シャルボーンとヴェマ・ハイドロジェン、ケベック州に水素サプライチェーンを構築。生産現場から産業用ガス供給までを統合し、輸送コストを削減
Vema Hydrogen has announced a Conditional Offtake and Infrastructure Development Agreement with Vema Hydrogen to develop a new hydrogen production and processing project in Québec. **Full Story**

5/18/2026 - EVOLOH Launches Commercial-Scale Hydrogen Project at 3M Facility
2026年5月18日　エボロー、3Mの施設で商業規模の水素プロジェクトを開始
EVOLOH, Inc., a manufacturer of electrolyzer stacks for electrolytic hydrogen production, announced a significant milestone in its commercialization: a commercial-scale pilot project agreement to deploy EVOLOH's S440 packaged hydrogen system at a 3M manufacturing facility. The system, rated at 2.5 megawatts, will be operational in 2027 subject to obtaining any required regulatory approvals, and will be used in an emissions reduction application at the plant, making it EVOLOH's largest real-world deployment to date. **Full Story**

Projects / プロジェクト

May 1-31, 2026

5/15/2026 - DiagnaMed Completes Acquisition of Colchester East Natural Hydrogen Project in Nova Scotia
2026年5月15日　ディアグナメッド、ノバスコシア州のコルチェスター・イースト天然水素プロジェクトの買収を完了

DiagnaMed Holdings Corp. announces that it has closed its previously announced acquisition of the Colchester East Natural Hydrogen Project, consisting of 30 licenses totaling 2,104 claims located within the Cumberland Basin in Nova Scotia. Pursuant to the closing of the acquisition, the Company acquired the Property by paying: (i) $10,000 in cash; and (ii) issuing an aggregate of 10,000,000 common shares at an issue price of $0.06 per share, being the closing price of the common shares of the Company on the CSE on the date immediately preceding the closing date. **Full Story**

5/15/2026 - Saskatchewan Bets on Natural Hydrogen: MAX Power Signs City of Moose Jaw
2026年5月15日　サスカチュワン州、天然水素に注力。マックス・パワー社がムースジョー市と契約を締結
MAX Power Mining Corp. has signed a Memorandum of Understanding with the City of Moose Jaw, formalising a partnership to jointly explore commercialisation opportunities for natural hydrogen in the Regina–Moose Jaw Industrial Corridor — the largest industrial zone in Saskatchewan and, arguably, the most strategically positioned piece of real estate in Canada's emerging natural hydrogen story. **Full Story**

5/07/2026 - CF Industries moves forward with its $4 billion blue hydrogen and ammonia complex in Louisiana; construction begins in 2026
2026年5月7日　CFインダストリーズ、ルイジアナ州で40億ドル規模のブルー水素・アンモニア複合施設の建設を推進、2026年に着工
CF Industries confirmed it is on track to begin construction in 2026 on its large-scale blue hydrogen and ammonia complex, further expanding its low-carbon fertilizer and energy production capacity in the U.S. The project will produce blue ammonia and blue hydrogen from natural gas, using carbon capture and storage technology, significantly reducing carbon dioxide emissions compared to conventional methods. This development supports the company's broader strategy to supply low-carbon fuels to agricultural, industrial, and energy markets.
Full Story

5/05/2026 - Hyundai-POSCO Louisiana Steel Selects Danieli for Hydrogen-Ready Integrated Steel Plant in the USA
2026年5月5日　ヒュンダイ・ポスコ・ルイジアナ・スチール、米国で水素対応型統合製鉄所の建設にダニエリを選定
HYUNDAI-POSCO Louisiana Steel LLC has selected Danieli as its technology partner for the construction of a new integrated steel plant in Louisiana, USA. The new facility will produce

Projects / プロジェクト

May 1-31, 2026

high-quality hot-rolled slabs, primarily intended for low-carbon, high value-added automotive steel grades for the North American market. Designed to be hydrogen future-ready and equipped with carbon capture technology, the DRP represents one of the most sustainable steelmaking solutions currently available on the market. Full Story

5/01/2026 - SoCalGas customers spared paying $266M for hydrogen pipeline project
2026年5月1日　南カリフォルニア・ガスの顧客、水素パイプライン事業にかかる2億6600万ドルの負担を回避
California regulators have denied utility Southern California Gas permission to collect $266 million from its customers to fund a sprawling hydrogen pipeline network it hopes to build across Southern and Central California. Environmental and consumer advocates are cheering the decision — and urging state policymakers to push for better options than costly hydrogen infrastructure projects to tackle the challenge of decarbonizing heavy industry. Full Story

Mobility/Transportation / モビリティ／輸送

May 1-31, 2026

5/18/2026 - Hyundai launches fuel cell trucks in Canada
2026年5月18日　ヒュンダイ、カナダで燃料電池トラックを展開
Hyundai Translead has announced Breadner Trailers, an established Hyundai Translead trailer dealer, will expand its role to serve as a dealer for the XCIENT Fuel Cell trucks in Canada. XCIENT Fuel Cell trucks are currently operating in several hydrogen mobility initiatives in Canada, including projects in British Columbia such as the BC Hydrogen Ports Project, the H2 Gateway Project led by Hydrogen Technology & Energy Corporation (HTEC), and the Heavy Duty Zero Emission Vehicles (HDZEV) Project overseen by Innovate BC. A total of 11 XCIENT Fuel Cell trucks are actively operating in Canada today. Full Story

5/11/2026 - Hapag-Lloyd explores green methanol offtake from planned $1.4bn Louisiana plant
2026年5月11日　ハパグ・ロイド、ルイジアナ州に建設予定の14億ドル規模のプラントからのグリーンメタノール調達を検討
Shipping firm Hapag-Lloyd is exploring biomass-based methanol offtake from a planned $1.4bn facility in Louisiana, US. The firm signed a letter of intent (LOI) with Southern Energy Renewables, which plans to build a wood waste biomass pathway to produce methanol and sustainable aviation fuels in St Charles Parish. This would see biomass gasified into hydrogen-rich syngas and then catalytically converted into methanol. Because the carbon within the wood waste came from the atmosphere, regulators and certifiers can classify the fuel as renewable or low-carbon. Full Story

Mobility/Transportation / モビリティ／輸送

May 1-31, 2026

5/10/2026 - Shell opens first US pipeline-fed hydrogen fueling station for fuel-cell vehicles
2026年5月10日 - シェル、米国初のパイプライン直結型燃料電池車用水素ステーションを開設
Shell on Tuesday opened the first-ever US pipeline-fed hydrogen fueling station, using hydrogen, a West Coast pipeline system, and fueling technology from Air Products. The station in Torrance, California - a collaborative effort between Air Products, Shell, Toyota, South Coast Air Quality Management District (SCAQMD) and the US Department of Energy (DOE) - will supply hydrogen for several automobile manufacturers' fuel cell vehicles in the Los Angeles area, the companies said. **Full Story**

5/05/2026 - Toyota to operate 40 Nikola hydrogen trucks in California under Hyroad deal
2026年5月5日　トヨタ、ハイロードとの契約に基づきカリフォルニア州でニコラ製水素トラック40台を運用
Toyota will use 40 Nikola hydrogen fuel cell trucks across Southern California under a vehicle supply, maintenance, and support agreement with coordinator Hyroad Energy. The Class 8 commercial trucks, made by now bankrupt Nikola Corporation, will be operated across Southern California and will use hydrogen from Toyota's own refuelling infrastructure in the state. While a timeline for deployment remains undisclosed, it comes as one of the first major deals for Hyroad under its as-a-service model, which offers vehicle sourcing, incentive organisation, and vehicle maintenance. **Full Story**

6/05/2026 - Powertech Labs Unveils High-Capacity Hydrogen Tube Trailer
2026年6月5日　パワーテック・ラボ、大容量水素チューブトレーラーを発表
Powertech Labs introduced a new hydrogen distribution solution designed to address one of the biggest challenges facing the hydrogen transportation market: moving more fuel at a lower delivered cost. The company unveiled what it describes as the industry's first smart, high-capacity, high-pressure hydrogen tube trailer, capable of transporting up to 1,050 kilograms of gaseous hydrogen at 517 bar, during a press event at ACT Expo 2026. Built on a 48-foot chassis using Type 4 carbon fiber tube technology, the trailer is designed to increase the amount of hydrogen delivered per trip, reducing transportation costs per kilogram while improving logistics efficiency for hydrogen producers, distributors, and fleet fueling operators. **Full Story**

Technology/Research / 技術/研究

May 1-31, 2026

5/29/2026 - SunHydrogen Installs Improved Hydrogen Modules at Austin Pilot, With Early Field Performance Consistent with Lab-Validated Modules

2026年5月29日　サンハイドロジェン、オースティンのパイロットプラントに改良型水素モジュールを設置。初期の実地性能は、ラボ検証済みのモジュールと同等

SunHydrogen, Inc. announced the successful installation of hydrogen modules built with its latest design improvements at its pilot demonstration system at the University of Texas at Austin's Hydrogen ProtoHub. During a recent on-site visit to the Austin pilot, the SunHydrogen team expanded the installation with a new set of hydrogen modules, including modules incorporating advances in catalyst integration and coating strategies identified during the pilot's initial commissioning. **Full Story**

5/21/2026 - Greentown Go Make 2026 with Shell and Technip Energies Announces Startup Cohort

2026年5月21日 - グリーンタウンGo Make 2026、シェルおよびテクニップ・エナジーズと共同でスタートアップ・コホートを発表

Greentown Labs, the world's largest climate tech and energy incubator, announced the startup cohort for Greentown Go Make 2026—an open-innovation program with Shell Catalysts & Technologies (Shell) and Technip Energies. Go Make 2026 focuses on process technology and catalytic innovations for low-carbon fuels, low-carbon gases, CO2 removal, and alternative chemical manufacturing. Catalysts are a critical enabler of the global energy transition. Nearly 90 percent of all chemical processes rely on catalysis, but many catalytic methods remain fossil-based and energy-intensive. **Full Story**

5/05/2026 - Element One Advances U.S.-Based Critical Minerals Production and Natural Hydrogen Research

2026年5月5日　エレメント・ワン、米国での重要鉱物生産および天然水素の研究を推進

Element One Hydrogen & Critical Minerals Corp. announced a significant step toward advancing a domestic U.S. supply platform for critical minerals and natural hydrogen research, following the execution of a Memorandum of Understanding ("MOU") with Twin Sisters Olivine, Ltd. ("Twin Sisters"). The MOU outlines a proposed framework under which Twin Sisters would provide a long-term supply of high-grade olivine material and sublease property in Washington State for the development of a planned demonstration facility. The Company is evaluating an initial plant capacity of approximately 50,000 tonnes of olivine per year. **Full Story**

Investments, Mergers, Acquisitions / 投資、合併、買

May 1-31, 2026

5/28/2026 First Atlas Resources Raises C$2M [$1.5M] for Nova Scotia Natural Hydrogen Exploration
2026年5月28日　ファースト・アトラス・リソーシズ、ノバスコシア州の天然水素探査向けに200万カナダドル（150万米ドル）を調達
First Atlas Resources has completed a C$2M Listed Issuer Financing to fund natural hydrogen exploration in Nova Scotia — one of Canada's emerging geological hydrogen target areas. **Full Story**

5/22/2026 MAX Power secures $18M from Sprott in boost to plans for Canadian hydrogen
2026年5月22日　マックス・パワー、エリック・スプロット氏から1,800万ドルの資金調達に成功。カナダにおける水素事業計画を推進
MAX Power Mining (CSE: MAXX) says it is accelerating the commercial validation of what would be Canada's first natural hydrogen system after securing a C$25 million ($18 million) investment from mining billionaire Eric Sprott. Sprott currently holds more than 10% of MAX Power's outstanding stock, and has agreed to not exceed its shareholder above 19.9%. **Full Story**

5/05/2026 UT startup to scale hydrogen fuel cell tech with UT seed fund investment
2026年5月5日　UT発スタートアップ、UTシードファンドからの出資を受け水素燃料電池技術のスケールアップへ
Discovery to Impact, the group overseeing the UT Seed Fund and research commercialization at The University of Texas at Austin, has invested in Celadyne Technologies, a materials science and energy systems startup from UT's Cockrell School of Engineering. Celadyne will use the $250,000 investment from the UT Seed Fund to advance hydrogen's role in securing critical defense and industrial applications while building a more resilient energy economy. **Full Story**