NEWS

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Industry leaders scale full value chain for hydrogen mobility across Europe

Today at IAA Transportation, Volvo Group, Daimler Truck, Toyota Motor Corporation, Bosch, Air Liquide, TotalEnergies, TEAL Mobility, and MB Energy unveiled their plans to accelerate the rollout of hydrogen-powered vehicles across Europe. For the first time in Europe, the German ecosystem has put in place all the conditions for a scalable deployment of hydrogen trucks by 2030, driven by the German authorities and European industrial leaders along the value chain. Building on the German deployment model as a blueprint, scaling these solutions across the continent calls for aligned support from national governments and the European Commission to ensure long-term energy resilience and competitiveness.

Rooted in the shared conviction that **hydrogen is an important complement to battery-electric vehicles in achieving the EU's decarbonization targets**, industry leaders are joining forces to overcome historical bottlenecks, particularly for truck operations requiring long range, high payload capacity, rapid refueling and operational flexibility. At Daimler Truck, customers have driven almost 600,000 kilometers with fuel cell trucks. As the next step, the company plans to deploy **a small series of 100 next generation fuel cell trucks into customer operations from the end of 2026 onwards.** In parallel, the first hydrogen combustion engine trucks (H2 ICE) are being prepared for market launch next year. Overall, the company invests a mid-three-digit million euro amount in hydrogen trucks by the end of the decade. Volvo Group is similarly advancing its hydrogen portfolio and investing significant amounts into hydrogen power solutions such as **both fuel-cell and hydrogen-combustion trucks for market rollout towards 2030**. Toyota will participate as a technology partner supporting the expansion of hydrogen mobility, leveraging more than 30 years of expertise gained through the development and supply of fuel cell systems, while Bosch is supplying key vehicle components for gaseous hydrogen - with its fuel cell system proven over more than 30 million kilometers on the road - alongside breakthrough refueling technologies for both liquid and gaseous hydrogen.

On the energy and infrastructure side, Volvo Group and Daimler Truck are closely cooperating with energy companies and hydrogen suppliers like Air Liquide, TotalEnergies and MB Energy, and retail operators such as MB Energy and TEAL Mobility (a 50/50 joint venture between TotalEnergies and Air Liquide, operating under the TotalEnergies brand). These players are mobilizing their respective capacities **to scale both liquid and gaseous hydrogen supply chains.** Through their infrastructure investments, they are advancing **toward large capacity, high-throughput refueling stations, able to refuel up to 100 trucks per day.** They are also leveraging synergies with the fast-growing industrial renewable hydrogen production, driven by the implementation of the European RED III directive. Reaching competitive costs with diesel is essential for fleet operators to adopt hydrogen. Crucially, combining German government policies with industrial collaboration makes this possible through three key levers:

1. Lowering truck cost through incentives and series production.
2. **Reaching diesel competitive hydrogen pump price** through a more competitive hydrogen supply chain and Greenhouse Gas quota mechanisms.
3. Offering operating incentives like zero emission toll exemptions for fleet operators.

Market is rising to meet these conditions. Recent applications under Germany's NOW funding program were oversubscribed, with over 70 high-capacity stations and 800 heavy-duty trucks applied for by industrial companies, confirming strong commercial pull from the logistics sector.

While **Germany serves as the operational launchpad**, demonstrating how industry action and targeted public support can accelerate market development, the industry leaders are calling for strategic measures – supported by **national governments and the European Commission** – **to replicate this model at a continental scale**.

These measures include scaling infrastructure through synchronized funding calls for refueling stations and vehicles to meet Alternative Fuels Infrastructure Regulation (AFIR) targets; strengthening the commercial viability of hydrogen through pragmatic, harmonized renewable fuel credit mechanisms and toll incentives; and **jointly de-risking the overall value chain, from production and liquefaction to final distribution and vehicle operation**.

This combination of industrial execution and a strong policy framework provides the foundation needed to scale zero-emission freight while reinforcing Europe's industrial **competitiveness, energy resilience and employment**, and reducing emissions from freight transport.