

GREEN HYDROGEN IN INDIA 2024

Projects, Policies and Outlook

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Green hydrogen has become a rapidly growing market in India with a slew of recent policy interventions, announcement of financial incentives and successive auctions for both green hydrogen production as well as electrolyser manufacturing. The market landscape continues to evolve with large projects being announced by a host of public and private sector players including renewable energy developers, conventional power producers, oil and gas majors, and other energy intensive users like steel, fertiliser, and cement manufacturers. Further, there is active interest around manufacturing of electrolysers, with capacity scale-up underway. There is a tremendous opportunity in the domestic as well as export-driven green hydrogen market for renewable power developers, conventional power producers, energy storage providers, oil and gas companies, manufacturers and technology providers, energy intensive industries as well as utilities.

This report will cover:

- Market Landscape
- Policy and Regulatory Environment
- Tenders and Project Pipeline
- Key Players and Their Plans
- Technology Trends and Electrolyser Manufacturing
- Cost Economics
- Outlook and Projections

Summary and Key Insights

1. Market Size and Potential

- ❖ Market Overview
- ❖ Demand and Key Applications
- ❖ Current Demand and Supply Trends
- ❖ Estimated Potential
- ❖ Key Areas of Adoption
- ❖ Potential Business Models
- ❖ Key Growth Drivers

2. Policy Framework and Roadmap

- ❖ Timeline of Key Government Initiatives
- ❖ Green Hydrogen Policy
- ❖ National Green Hydrogen Mission
- ❖ Green Hydrogen Standard
- ❖ Financial Incentives and Waivers
- ❖ Green Hydrogen Guidelines for
 - SIGHT Scheme
 - Use in Transport Sector
 - Use in Steel Sector
 - Use in Shipping Sector
 - Establishing Hubs
 - Funding Testing Facilities
- ❖ State Level Policies and Initiatives
- ❖ Key Alliances and Collaborations

3. Major Players and Plans

- ❖ Recent Auction Results
- ❖ Tender Announcements
- ❖ Key Upcoming Projects
- ❖ Plans of Key Players
 - Developers (Power Producers, Oil and Gas Companies, Industries)

- Electrolyser Manufacturers
- Other Stakeholders
- ❖ Case Studies

4. Technology Trends

- ❖ Types of Electrolysers
 - Proton Exchange Membrane
 - Alkaline Electrolysers
 - Other
- ❖ Focus on Fuel Cells
- ❖ Storage and Transportation
- ❖ Applicable Standards

5. Cost of Production and Investments

- ❖ Cost of Green Hydrogen Production
- ❖ Grey Hydrogen versus Green Hydrogen
- ❖ Key Factors Impacting Cost
- ❖ Emerging Financing Options
- ❖ Cost and Investment Outlook

6. Future Outlook (till 2030)

- ❖ Project Pipeline
- ❖ Capacity Outlook
- ❖ Required Renewable Energy Capacity
- ❖ Key Issues and Challenges
- ❖ Way Forward
 - Domestic Market
 - Export-Driven Market

This report will have a comprehensive green hydrogen project dataset with commissioned, announced and under-implementation projects. Some parameters covered here will include project developer, location, capacity, application, and status of the project.

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