Third market information package: Reservations show significant demand along the hydrogen core network

Market Information Package 3

Since 19 March 2026, core hydrogen network operators have offered the market the opportunity to reserve hydrogen capacity, particularly to secure supply contracts. The details were first published on 5 March 2026 in the second market information package, followed in May by an initial interim report on the marketing launch. This third market information package provides a more detailed update on the status of reservations and current capacity on offer, along with an outlook on further developments. The reservation principles outlined in the two previous market information packages remain unchanged.

Since the press release, further enquiries have been received and processed, resulting in the conclusion of several reservation contracts. In cases where enquiries exceeded the initial capacity framework, the network operators applied their prepared excess demand process, which in all instances led to positive outcomes and thus to reservation offers.

The excess demand process follows a multi-stage approach to satisfy every request where possible. Initially, optimization within the offer zones is pursued. If this proves insufficient, reallocation between offer zones and clusters is examined. Finally, it is assessed whether the requested capacity can be provided through physical measures in the network. These include pressure adjustments by network connection customers, as well as the integration of additional infrastructure based on the network development plan. This step-by-step approach ensures that the development of the hydrogen core network remains efficient and demand-oriented.

Based on the reservations made and the reallocations triggered by the excess demand process, the network operators have reassessed the capacities in the hydrogen core network. In the following overviews on this new basis, both the reserved and available capacities are presented over time.

Available capacities

The following tables show the level of available capacities in the offer zones and the maximum nomination possibility for cross-cluster transports over time as of 23.07.2026. The available capacities offered within an offer zone can be marketed at any entry or exit point within that zone without additional flow-mechanical verification in the transport network level. Depending on the scope and specific location of entry or exit, further capacity possibilities may arise. It should be noted that the capacity values for the years 2031–2034 are based on the infrastructure of 2030 (commissioning up to 31.12.2029). Additional infrastructure measures, whose implementation is planned for 2030–2037, may lead to capacity increases.

The network operators point out that the described excess demand process continues to apply. Therefore, reservation requests remain explicitly welcome, even if they exceed the indicated available capacities. These market signals are essential for a market-oriented expansion of the hydrogen core network.

Overview of available capacities (as of 23.07.2026)

**Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)*

Cluster Nord-West	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ NW 1 GetH2 Nord	Nowega | OGE	256	300	330	300	330	300	330	300	121	300	121	300	121	300	121	300	121	300
AZ NW 2 GetH2 Süd	Thyssengas H2 | OGE | Nowega	320	394	320	394	305	450	268	450	230	450	193	450	155	450	95	450	20	450
AZ NW 3 Oude	Gasunie Deutschland	-	-	-	-	-	-	-	-	1080	1550	1080	1550	1080	1550	1080	1550	1080	1550
AZ NW 4 Friesland	GTG Nord | OGE	-	-	-	-	1300	1500	1300	1500	1055	1500	1055	1500	1055	1500	1055	1500	1055	1500
AZ NW 5** Hamburg / Brunsbüttel / Ellund	Gasunie Deutschland | Hamburger Energienetze | Brunsbüttel Gasnetz GmbH (ab 1.4.26)	-	-	-	-	857	100	766	100	281	100	249	100	249	100	249	100	249	100
AZ NW 6 Hallendorf / Salzgitter	Gasunie Deutschland | Nowega	-	-	-	-	-	-	-	-	100	50	100	50	100	50	100	50	100	50
AZ NW 7 Bremen / Huntorf	Gasunie Deutschland | GTG Nord	-	-	-	-	230	200	230	200	130	122	130	122	130	122	130	122	130	122
Total		**576**	**694**	**650**	**694**	**3022**	**2550**	**2893**	**2550**	**2997**	**4072**	**2927**	**4072**	**2890**	**4072**	**2830**	**4072**	**2755**	**4072**

***AZ NW 5 feed-in pressure from 01.01.2031: 45 barg*
The hydrogen network of Hamburger Energienetze forms a regional network with a design pressure of 25 barg. The maximum feed-in pressure here is 25 barg, whilst the minimum exit pressure is below 18 barg. The Moorburg compressor station ensures that hydrogen can be fed from Hamburg into the WTNB network.

Cluster Hannover Ost	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ HO 1**	Gasunie Deutschland	**Cluster Hannover Ost will only become available in 2029**						280	599	**Cluster Hannover Ost will be transferred to AZ NW 6 in 2030**									
Total								**280**	**599**										

***AZ HO 1 will be transferred to AZ NW 6 in 2030 due to the connection to Cluster Nord-West then in place*

**Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)*

Cluster Mitteldeutschland	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ MD 3 (Kulkwitz)-Leuna Süd-Milzau	ONTRAS	160	868	160	858	160	858	160	858	**Cluster Mitteldeutschland will be transferred to Cluster Ost in 2030**									
AZ MD 4 Milzau-Bad Lauchstädt	ONTRAS	137	177	137	177	137	177	137	177										
AZ MD 5* Bad Lauchstädt-Zöllnitz	Ferngas	-	-	-	-	155	179	155	179										
AZ MD 6 Milzau-Großkugel	ONTRAS	-	-	-	-	177	142	177	142										
AZ MD 7 Großkugel-Plaußig-(Mühlberg)	ONTRAS	-	-	-	-	177	48	177	48										
AZ MD 8 Großkugel-Apollensdorf	ONTRAS	-	-	-	-	-	-	177	177										
AZ MD 9 Apollensdorf-Piesteritz	ONTRAS	-	-	-	-	-	-	355	139										
AZ MD 11 Leuna-Böhlen	ONTRAS	-	-	-	-	-	-	177	177										
Total		**297**	**1045**	**297**	**1035**	**806**	**1404**	**1515**	**1897**										

** In 2029, the AZ receives one third of the 2030 capacity of AZ OS 5 in Cluster Ost*

**Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)*

Cluster Flow		2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ FL 1 Lubmin-Schönermark	GASCADE | LBTG	1.966	83	1.966	83	1.966	83	1.808	83	**Cluster Flow will be transferred to Cluster Ost in 2030**									
AZ FL 2 Schönermark-Bobbau	GASCADE	983	154	983	154	983	154	983	154										
Total		**2.948**	**238**	**2.948**	**238**	**2.948**	**238**	**2.790**	**238**										

**Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)*

Cluster Flow 2	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ FL 21 Reckrod-Rückersdorf	GASCADE	**Cluster Flow 2 will become available in 2029**						309	357	**Cluster Flow 2 will be transferred to Cluster Ost in 2030**									
Total								**309**	**357**										

Overview of available capacities (as of 23.07.2026)

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Cluster Ost	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ OS 1 Rostock-Schönermark	GASCADE | LBTG									1363	83	1363	83	1363	83	1363	83	1363	83
AZ OS 2 Greifenhagen-Rückersdorf	GASCADE									983	33	983	33	983	33	983	33	983	33
AZ OS 3 Kulkwitz-Milzau	ONTRAS									160	390	160	390	160	390	160	390	160	390
AZ OS 4 Milzau-Bad Lauchstädt	ONTRAS									137	177	137	177	137	177	137	177	137	177
AZ OS 5* Rückersdorf-Bad Lauchstädt-Ludwigsh.	GASCADE | Ferngas									464	536	464	536	464	536	464	536	464	536
AZ OS 6 Milzau-Großkugel	ONTRAS									177	142	177	142	177	142	177	142	177	142
AZ OS 7 Großkugel-Plaußig-(Mühlberg)	ONTRAS									177	48	177	48	177	48	177	48	177	48
AZ OS 8 Großkugel-Apollensdorf	ONTRAS									177	177	177	177	177	177	177	177	177	177
AZ OS 9 Apollensdorf-Piesteritz	ONTRAS									355	139	355	139	355	139	355	139	355	139
AZ OS 11 Leuna-Böhlen	ONTRAS									177	177	177	177	177	177	177	177	177	177
AZ OS 12 Hallendorf-Bad Lauchstädt (inkl. CÜP)	ONTRAS									-	119	-	119	-	119	-	119	-	119
Total										**4.170**	**2.022**	**4.170**	**2.022**	**4.170**	**2.022**	**4.170**	**2.022**	**4.170**	**2.022**

Cluster Ost will be formed in 2030 from Cluster Mitteldeutschland, Cluster Flow and Cluster Flow 2

** Will be formed in 2030 through the merger of AZ MD 5 (2029, Cluster Mitteldeutschland) and AZ FL 21 (2029, Cluster Flow 2)*

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Cluster Burghausen	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ BU 1 HyPipeBavaria one	bayernets	-	-	1280	-	1280	-	1280	-	1123	298	1123	298	1123	298	1123	298	1123	298
Total		-	-	**1280**	-	**1280**	-	**1280**	-	**1123**	**298**	**1123**	**298**	**1123**	**298**	**1123**	**298**	**1123**	**298**

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Cluster Ingolstadt	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ IN 1 HyPipeBavaria two	bayernets	-	-	-	-	-	-	1301	1301	1301	1301	1301	1301	1301	1301	1301	1301	1301	1301
Total		-	-	-	-	-	-	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**	**1301**

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Cluster MosaHYc	Network operator	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
AZ MO 1 mosaHYc	Creos	-	-	-	-	-	-	1117	1117	1117	1117	1117	1117	1117	1117	1117	1117	1117	1117
Total		-	-	-	-	-	-	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**	**1117**

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Total across all clusters	2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
Total reservable capacity across all clusters	**3821**	**1977**	**5175**	**1967**	**8055**	**4191**	**11485**	**8059**	**10708**	**8811**	**10637**	**8811**	**10600**	**8811**	**10540**	**8811**	**10465**	**8811**

*Values are based on the infrastructure for marketing year 2030 (commissioning by 31.12.2029)

Inter-cluster transport (ICT)		2026		2027		2028		2029		2030		2031*		2032*		2033*		2034*	
(in MWh/h)		Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit	Entry	Exit
Hallendorf (Cluster Nord-West)	Gasunie Deutschland	-	-	-	-	-	-	-	-	100	-	100	-	100	-	100	-	100	-
Hallendorf (Cluster Ost)	ONTRAS	-	-	-	-	-	-	-	-	-	100	-	100	-	100	-	100	-	100
Bobbau (Cluster Flow)	GASCADE	-	-	-	-	-	-	-	2507	-	-								
Bobbau (Cluster Mitteldeutschland)	ONTRAS	-	-	-	-	-	-	2507	-	-	-								
Zöllnitz (Cluster Mitteldeutschland)	Ferngas	-	-	-	-	-	-	309	357	-	-								
Zöllnitz (Cluster Flow 2)	GASCADE	-	-	-	-	-	-	357	309	-	-								

The Bobbau ICT will become an internal interconnection point in Cluster Ost from 2030

The Zöllnitz ICT will become an internal interconnection point in Cluster Ost from 2030

Reserved capacities (as of 23.07.2026)

The following charts show the level of already reserved capacities over time as of 23.07.2026. Several reservation requests are currently still under review and may lead to additional reservation contracts. To protect the operational and business secrets of market participants, capacity reservations are partially presented in aggregated form.

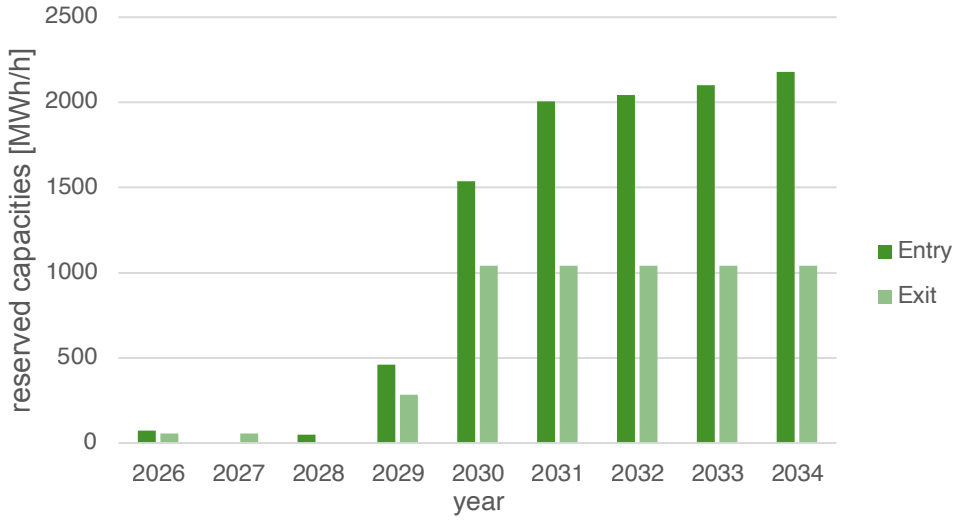


Figure 1: Level of reserved capacities in clusters Nord-West, Aachen & MosaHYc

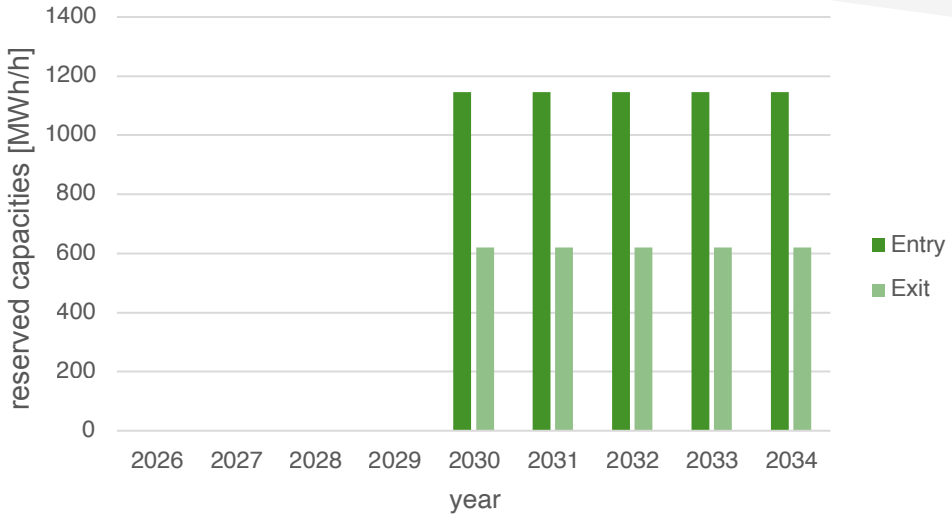


Figure 2: Level of reserved capacities in cluster Ost

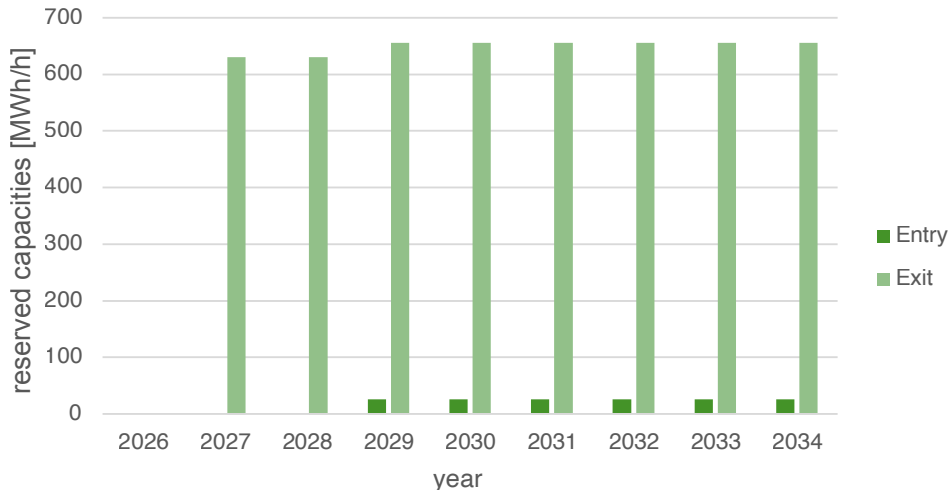


Figure 3: Level of reserved capacities in clusters Burghausen and Ingolstadt

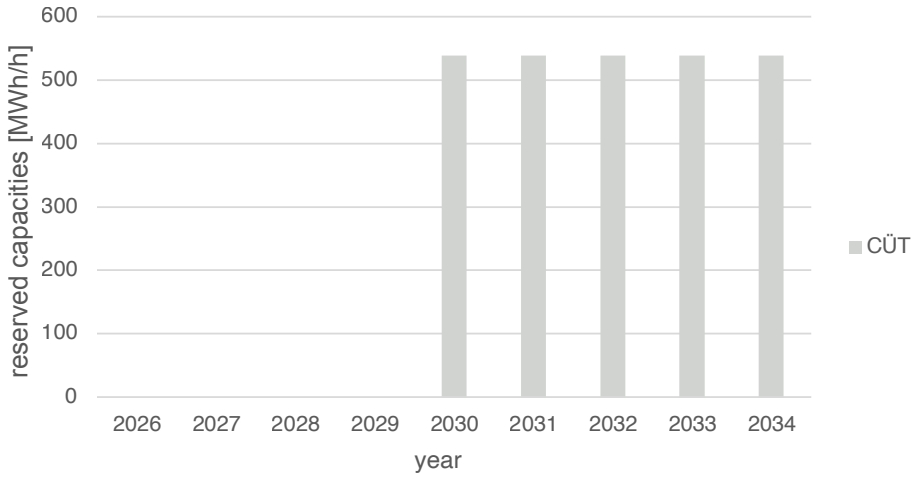


Figure 4: Level of reserved capacities in clusters at CÜT Hallendorf

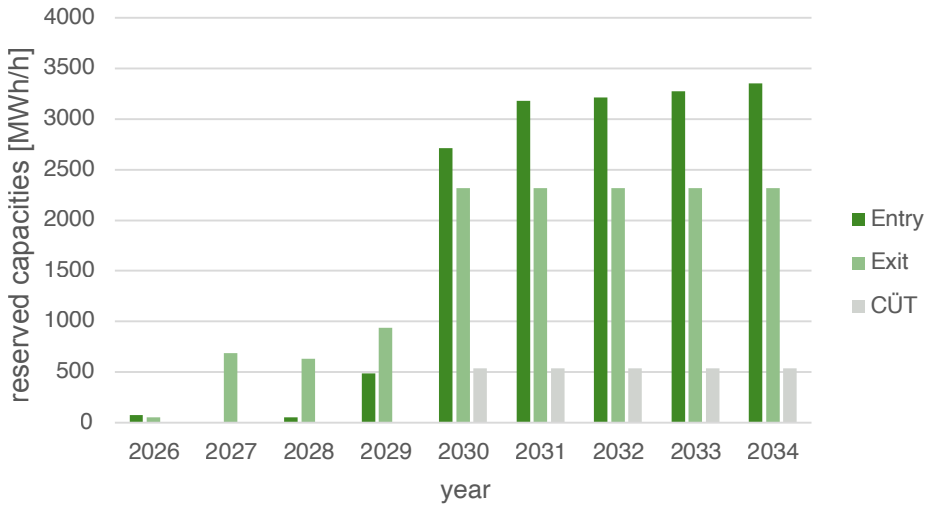


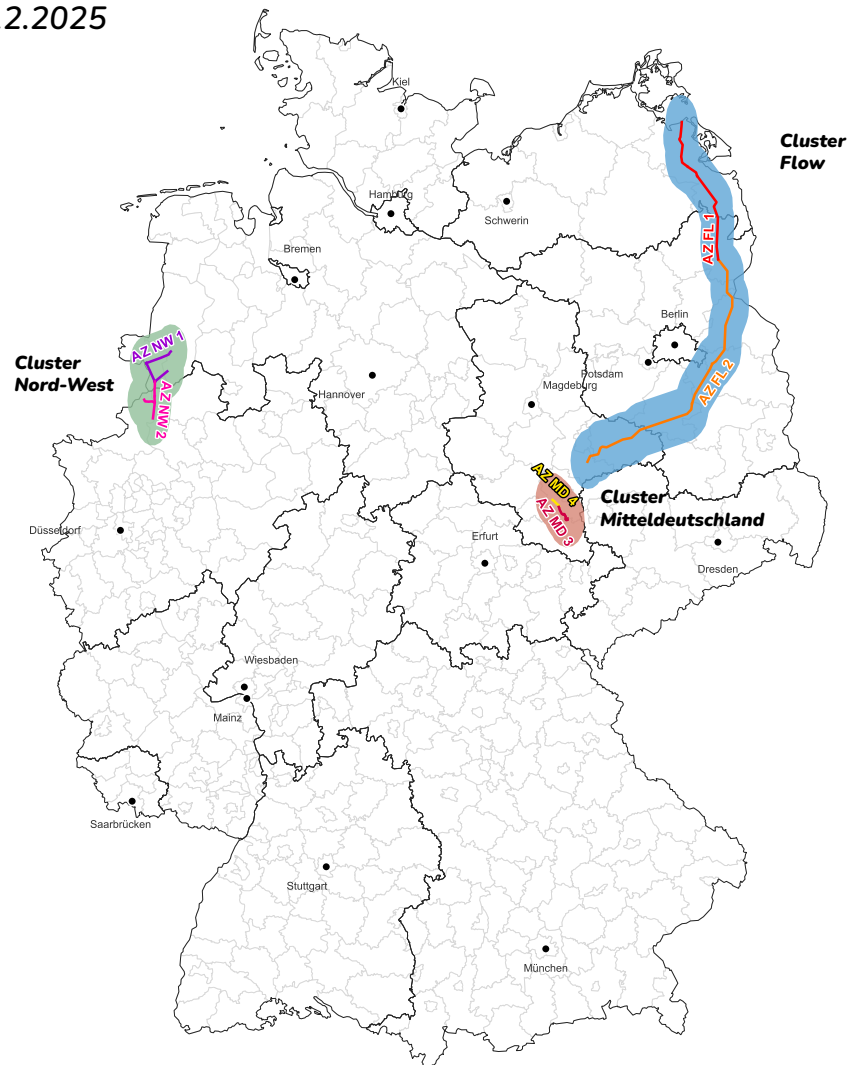
Figure 5: Level of aggregated reserved capacities and CÜT

The hydrogen core network operators intend to update and publish the development of capacities, clusters, and offer zones on a quarterly basis. It is planned to extend the presentation to include additional years and to align it with the publication obligations required in the WaKandA and WasABi regulations.

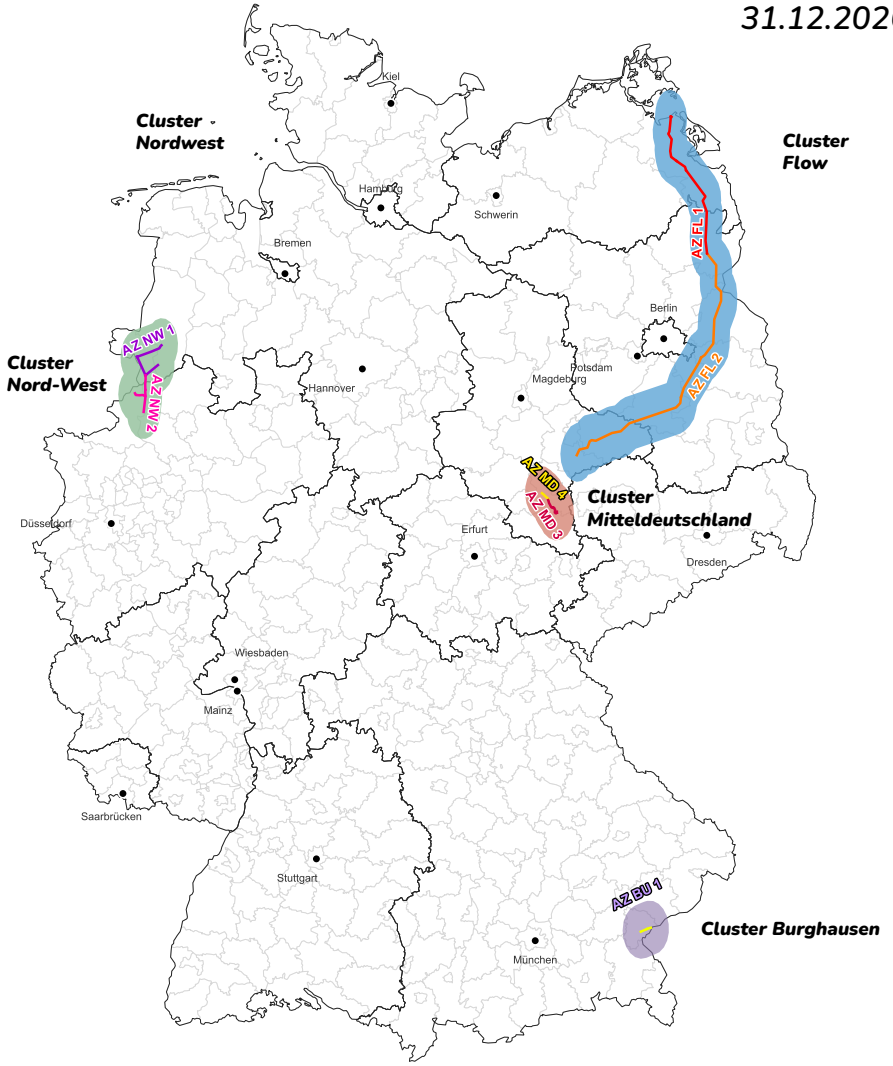
Development of clusters and offer zones by 2030

Below, the development of clusters and offer zones already shown in the second market information package is presented once again based on updated data.

31.12.2025



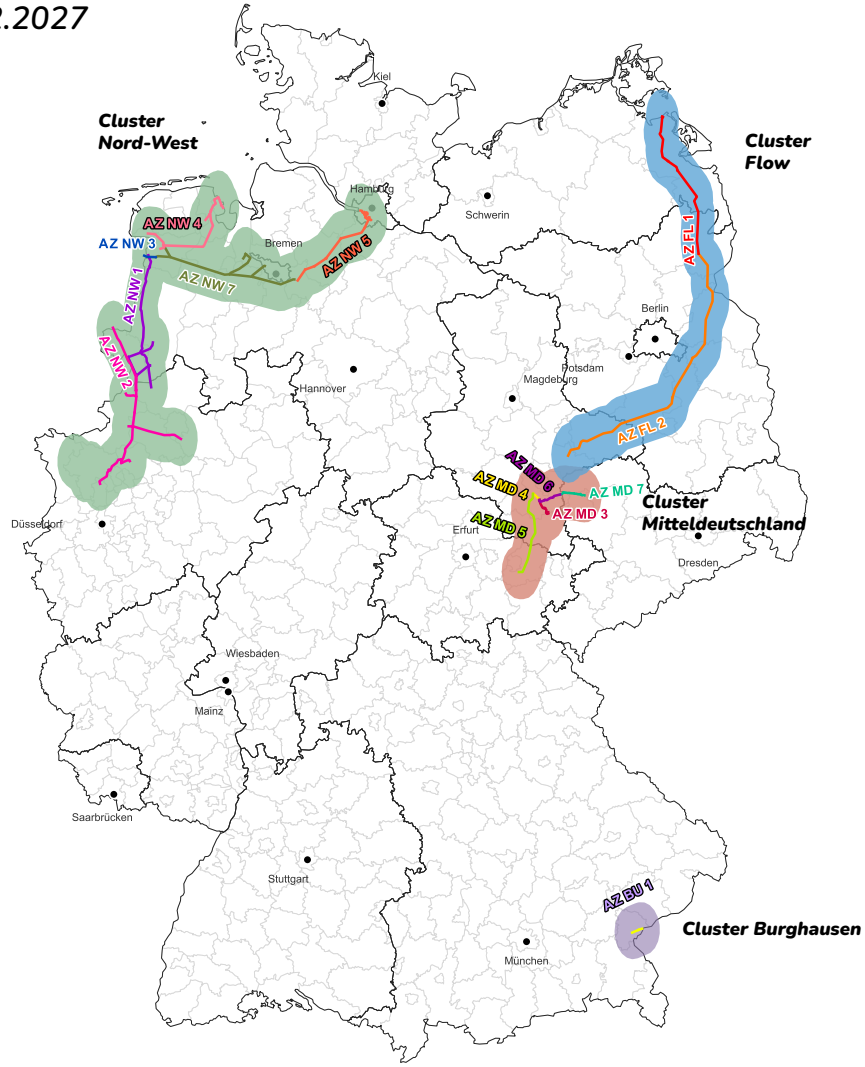
31.12.2026



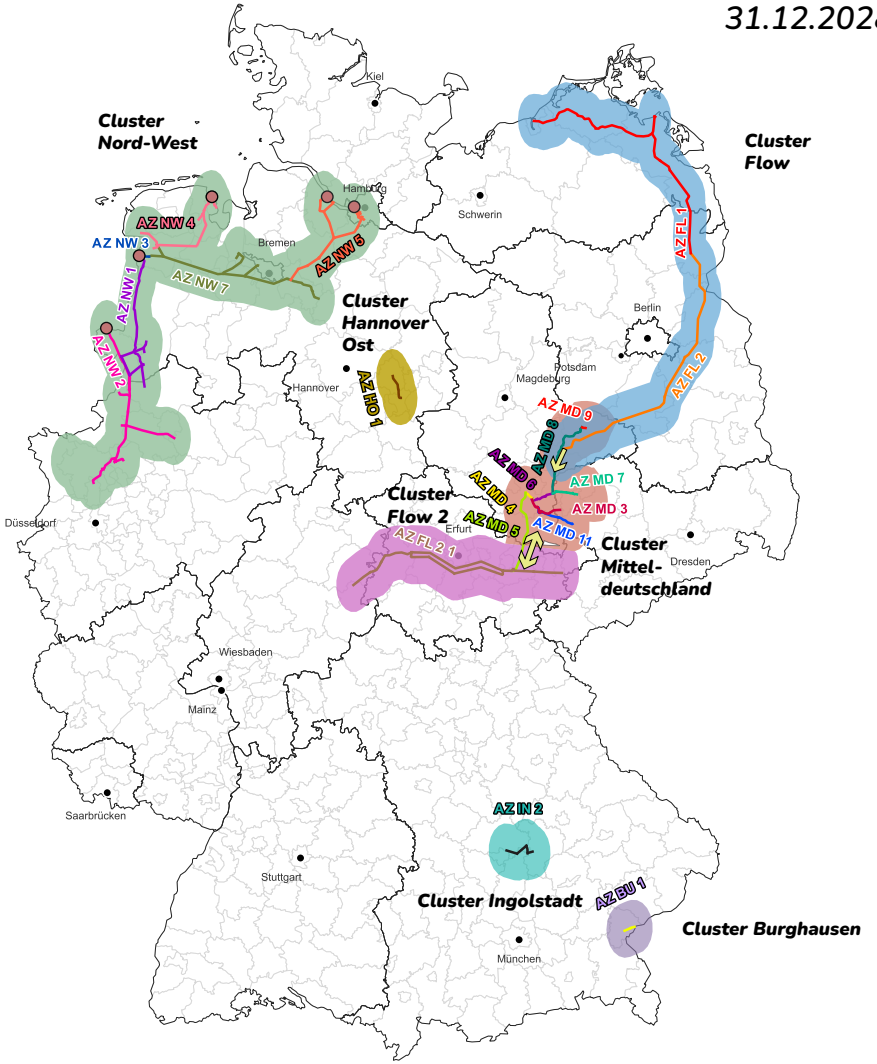
Development of clusters and offer zones by 2030

Below, the development of clusters and offer zones already shown in the second market information package is presented once again based on updated data.

31.12.2027



31.12.2028



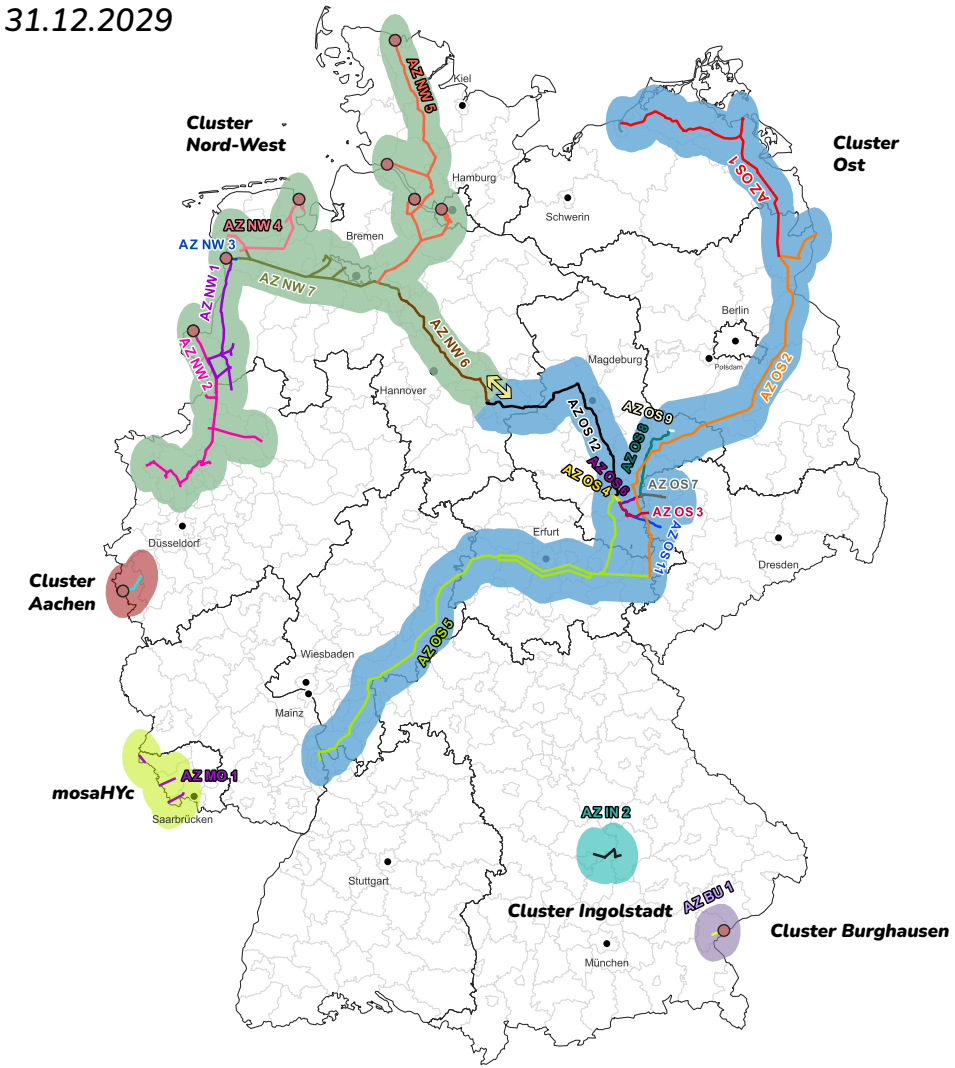
Cross-cluster transport

Interconnection points and H2 terminals

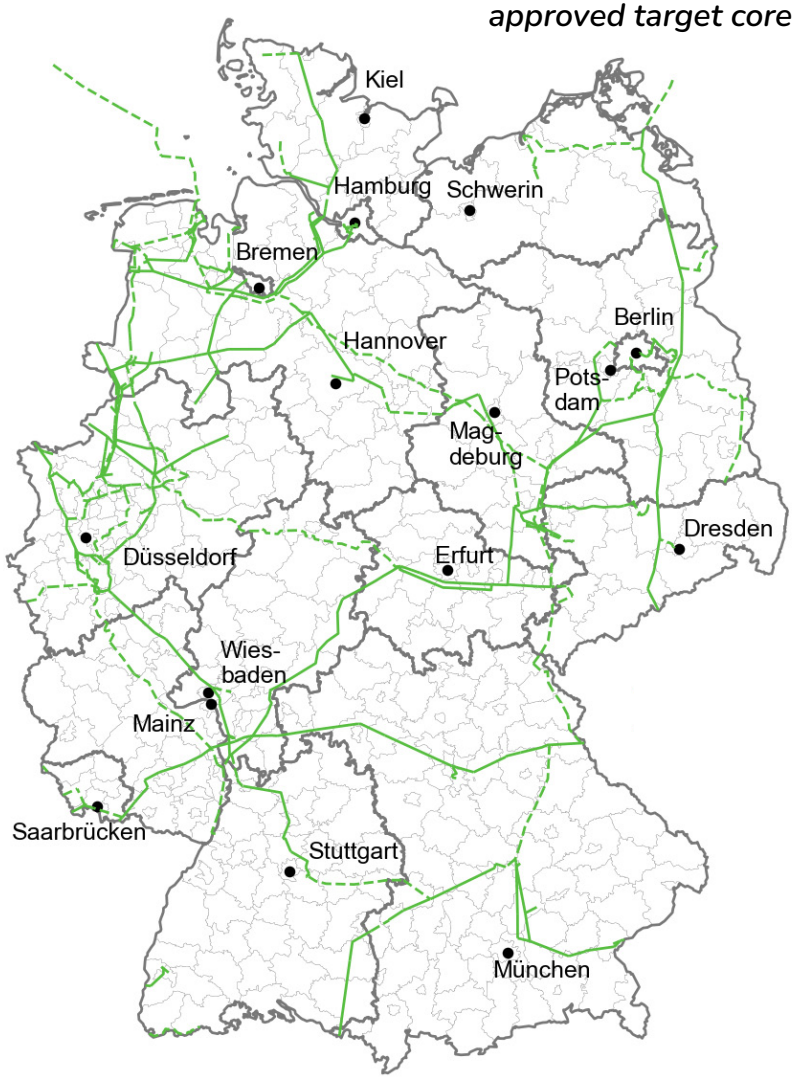
Development of clusters and offer zones by 2030

Below, the development of clusters and offer zones already shown in the second market information package is presented once again based on updated data.

31.12.2029



approved target core network



Cross-cluster transport

Interconnection points and H2 terminals