



Berlin, April 7<sup>th</sup> 2026

## INES Announces New Market Survey on Hydrogen Storage

The Initiative Energien Speichern e.V. (INES) will conduct the market survey “Market Assessment for Hydrogen Storage” (MAHS) again in 2026. The objective is to determine future demand for hydrogen storage capacities and to establish a robust basis for investment decisions. Companies are invited to actively contribute their requirements and thereby support the demand-oriented development of a competitive hydrogen storage market.

From **14 April to 5 June 2026**, INES will once again carry out a market survey on demand structures for hydrogen storage (Market Assessment for Hydrogen Storage, MAHS). Following its initial implementation in 2024, INES is establishing the MAHS as a key instrument for identifying the market-based demand for hydrogen storage capacities in Germany.

The survey is aimed at companies intending to store hydrogen in the future. Its goal is to create a sound, nationwide data basis to determine both the concrete demand for hydrogen storage capacities and the associated requirements for storage services.

With the first MAHS in 2024, INES had already initiated a consolidated market survey to provide storage operators with a common basis for fulfilling regulatory requirements. With the renewed implementation in 2026, this approach is being further developed and adapted to current market conditions.

### **FURTHER DEVELOPMENT OF THE MAHS BASED ON CURRENT MARKET TRENDS**

Since the first survey, both the market and the regulatory framework for hydrogen have evolved significantly. Hydrogen will play a central role in the future energy system—particularly for the integration of renewable energy, ensuring security of supply, and the decarbonisation of industry.

Accordingly, existing scenarios indicate a substantial demand for hydrogen storage: by 2045, demand of up to **80 TWh** is expected in Germany alone. The MAHS 2026 complements these top-down scenarios with a renewed market-oriented bottom-up analysis.

Compared to the initial survey, the MAHS 2026 has been conceptually expanded. For the first time, it also captures developments over the past two years in order to systematically assess changes in market conditions and in companies’ demand. In addition, the survey structure has been further refined to enable more detailed insights into storage demand, hydrogen supply, and hydrogen use.

## **CONTRIBUTION TO THE DEVELOPMENT OF A MARKET-BASED HYDROGEN STORAGE MARKET**

For the development of hydrogen storage infrastructure, it is essential for storage operators to understand the specific needs and requirements of future users. The MAHS provides a central data basis for this purpose. The results will be made available—anonymised and aggregated—to storage operators, ministries, and regulatory authorities.

As in 2024, the MAHS also supports the implementation of European regulatory requirements: under Article 9 of Regulation (EU) 2024/1789 on the internal markets for renewable gas, natural gas and hydrogen, storage operators are required to regularly conduct market assessments for investments in storage for renewable and low-carbon gases. With the MAHS, INES supports a coordinated and efficient implementation of these requirements at the national level.

Furthermore, the MAHS supports policymakers in shaping the market and regulatory framework to facilitate the development of hydrogen storage. To date, operators still lack sufficient planning and investment certainty to develop the required hydrogen storage capacities. Incorporating the results of the INES MAHS into the Gas and Hydrogen Network Development Plan can contribute to improved planning certainty.

## **BROAD PARTICIPATION AND TRANSPARENT IMPLEMENTATION**

Participation in the MAHS is voluntary and open to companies from Germany and abroad. The survey will be conducted via a web-based platform on the INES website and will be available in both German and English.

To ensure a high level of participation and robust results, INES will widely communicate the survey and support it through various accompanying measures, including a

**webinar on 22 April 2026 at 11:00 a.m.**

to explain the content and structure of the questionnaire.

Announcing the renewed implementation of the MAHS 2026, Sebastian Heinermann, Managing Director of INES, states:

*„With the renewed implementation of the MAHS, we are creating transparency regarding storage demand in the emerging hydrogen market. The results provide an important basis for investment decisions for storage operators and help to develop hydrogen storage in a demand-oriented and competitive manner. At the same time, we offer potential users of hydrogen storage the opportunity to contribute their requirements at an early stage. Their input plays a crucial role in aligning future storage offerings with actual market needs.“*

**ABOUT US:**

The Initiative Energien Speichern e.V. (INES) is an association of operators of German gas and hydrogen storage facilities based in Berlin. With currently 17 members, INES represents over 90 percent of German gas storage capacities and about 25 percent of all gas storage capacities in the EU. INES members are also driving the development of underground hydrogen storage in numerous projects and are among the pioneers of this important energy transition technology.

The members of the initiative are bayernugs GmbH, Enovos Storage GmbH, Etsel-Kavernenbetriebsgesellschaft mbH & Co. KG, EWE Gasspeicher GmbH, Gasunie Energy Solutions I GmbH, HanseWerk AG, OMV Gas Storage Germany GmbH, NAFTA Speicher GmbH & Co. KG, RAG Energy Storage, RWE Gas Storage West GmbH, SEFE Storage GmbH, STORAG ETZEL GmbH, Storengy Deutschland GmbH, Trianel Gasspeicher Epe GmbH & Co. KG, Uniper Energy Storage GmbH, USG Blexen GmbH and VNG Gasspeicher GmbH.

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