# 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 | | | | | | | 280 | 599 | | | | | | | | | | |
| **Total** | | **Cluster Hannover Ost will only become available in 2029** | | | | | | **280** | **599** | | | **Cluster Hannover Ost will be transferred to AZ NW 6 in 2030** | | | | | | | |

***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 | | | | | | | | | | |
| AZ MD 4 Milzau-Bad Lauchstädt | ONTRAS | 137 | 177 | 137 | 177 | 137 | 177 | 137 | 177 | | | | | | | | | | |
| AZ MD 5* Bad Lauchstädt-Zöllnitz | Femgas | - | - | - | - | 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 | | | | | | | | | | |
| 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** | | | | | | | | | | |

**Cluster Flow will be transferred to Cluster Ost in 2030**

*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 | | | | | | | 309 | 357 | | | | | | | | | | |
| **Total** | | **Cluster Flow 2 will become available in 2029** | | | | | | **309** | **357** | | | **Cluster Flow 2 will be transferred to Cluster Ost in 2030** | | | | | | | |

# 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.

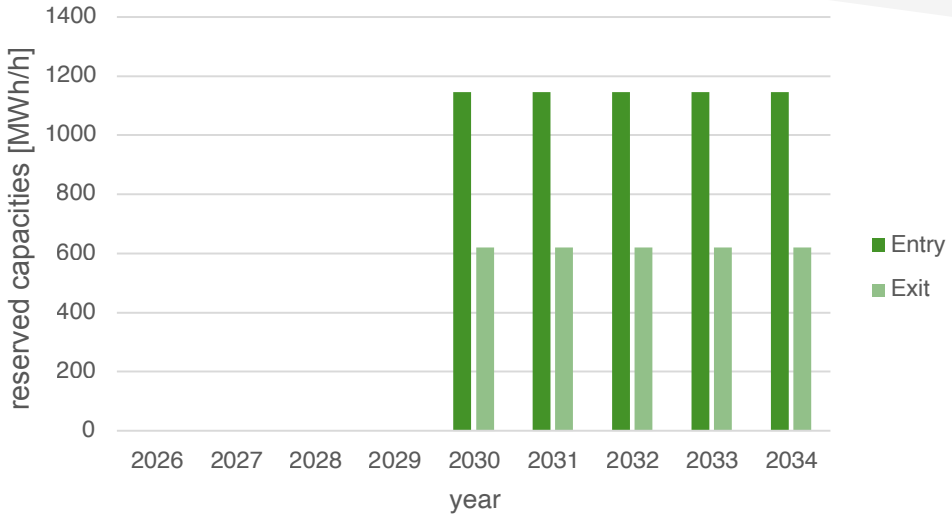



Figure 2: Level of reserved capacities in cluster Ost

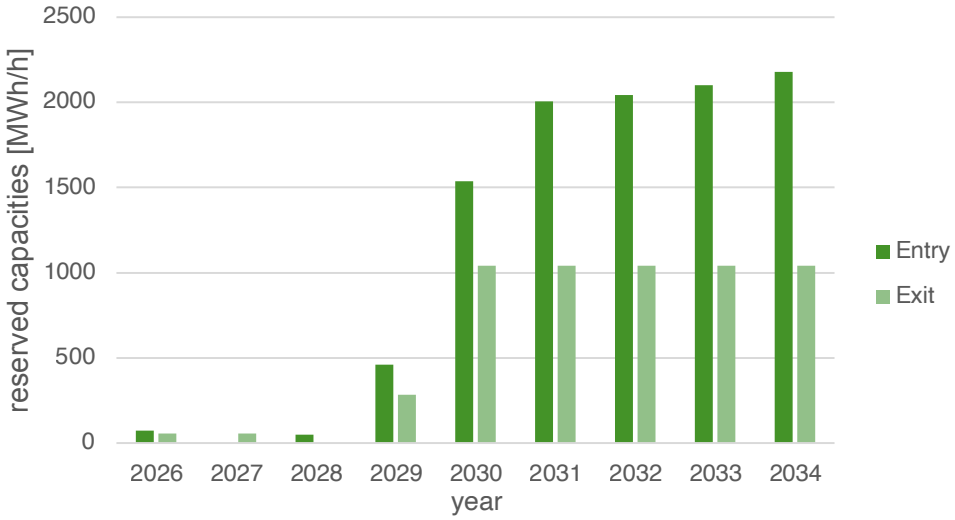



Figure 1: Level of reserved capacities in clusters Nord-West, Aachen & MosaHYc

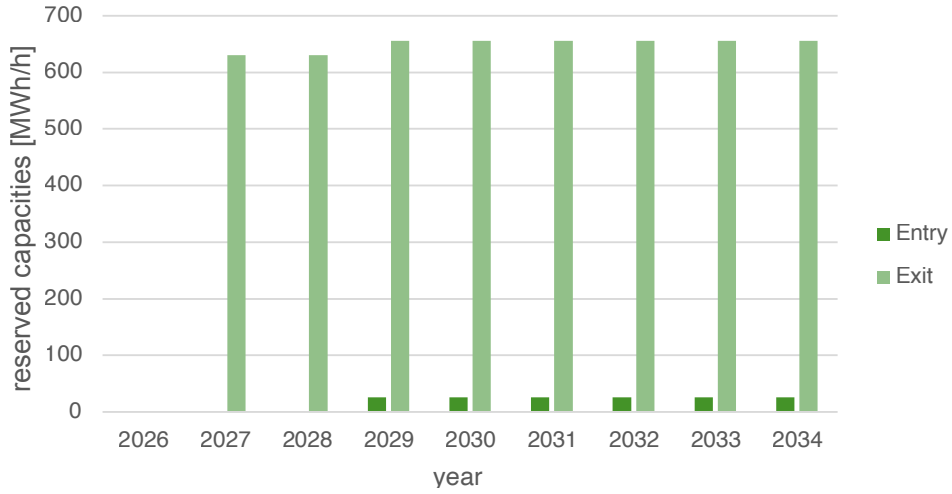



Figure 3: Level of reserved capacities in clusters Burghausen and Ingolstadt

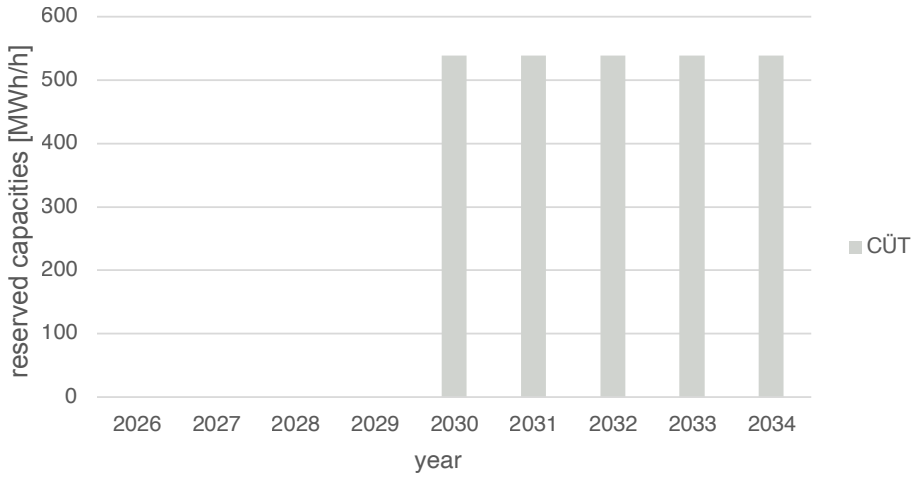



Figure 4: Level of reserved capacities in clusters at CÜT Hallendorf

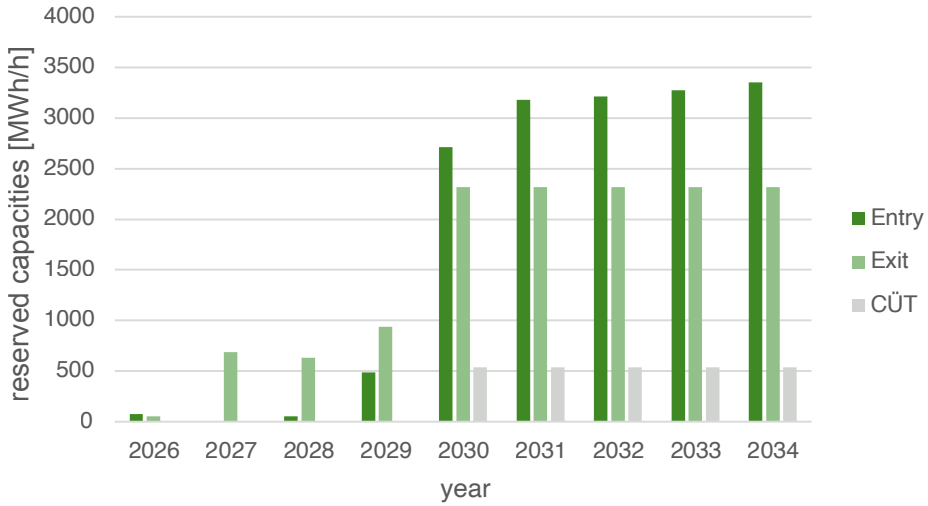


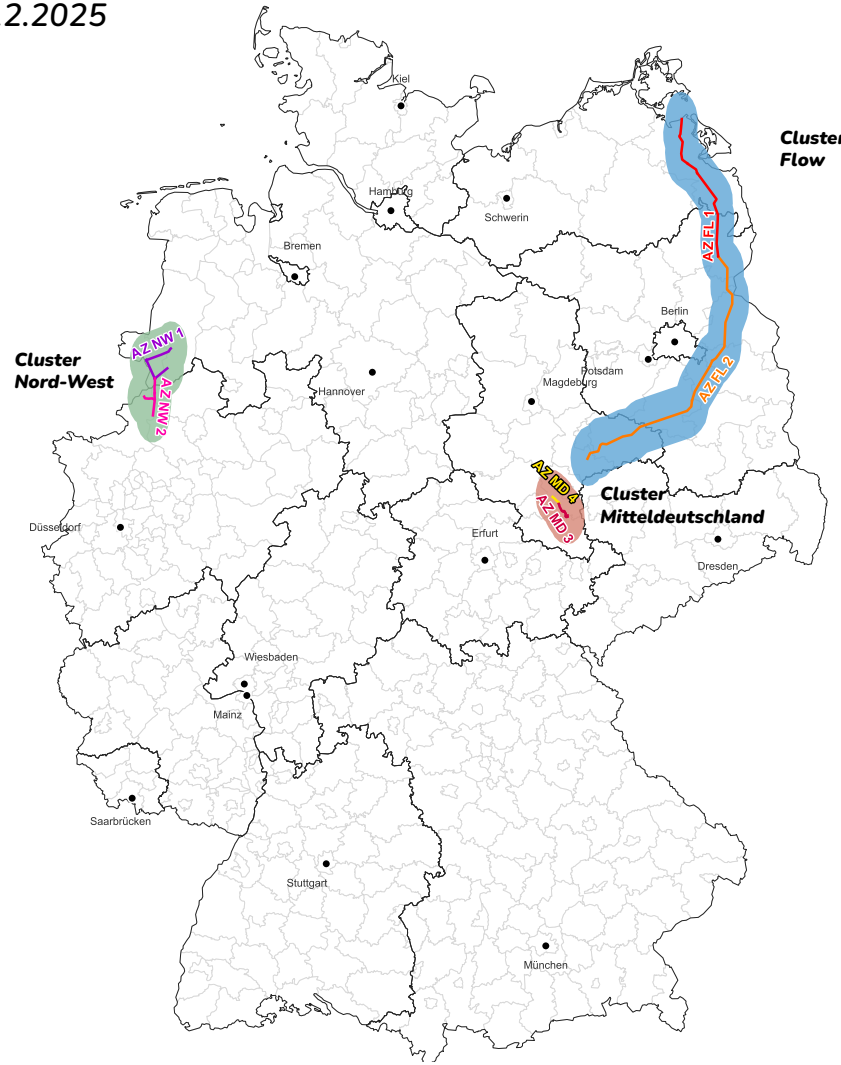

Figure 5: Level of aggregated reserved capacities and CÜT

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.

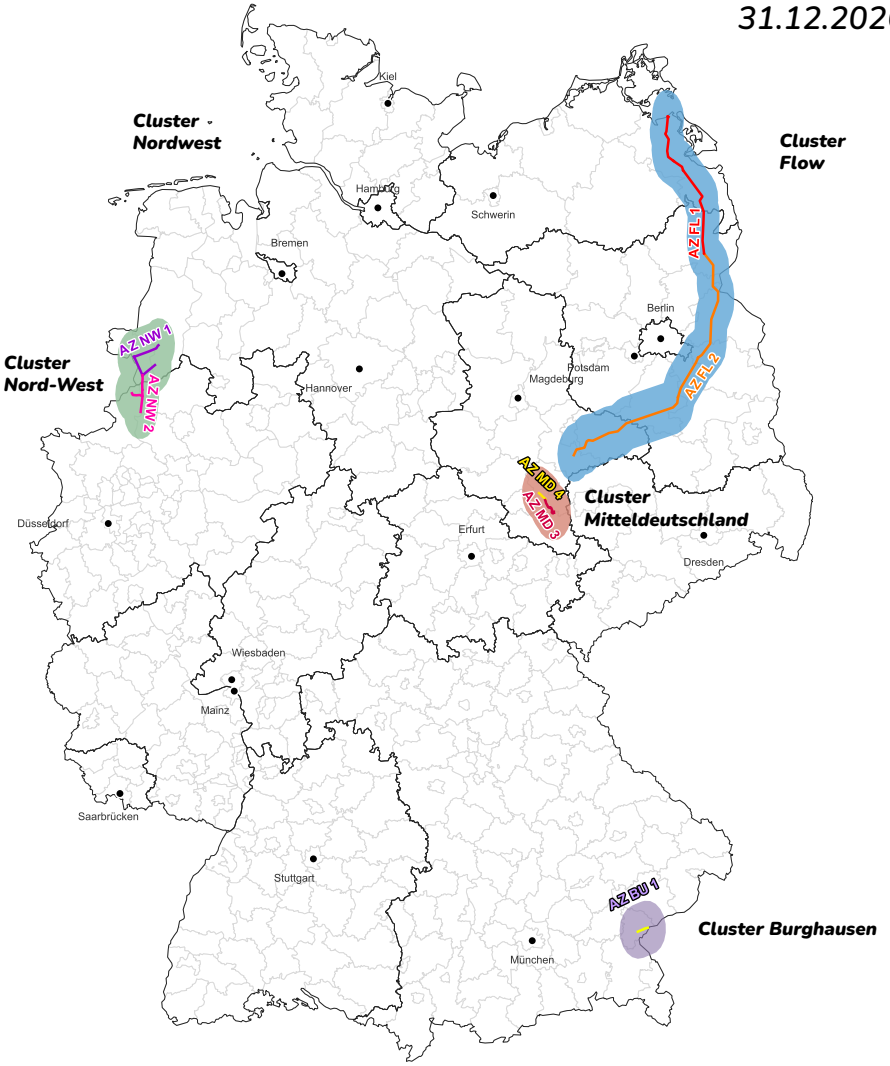
# Development of clusters and offer zones by 2030

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*



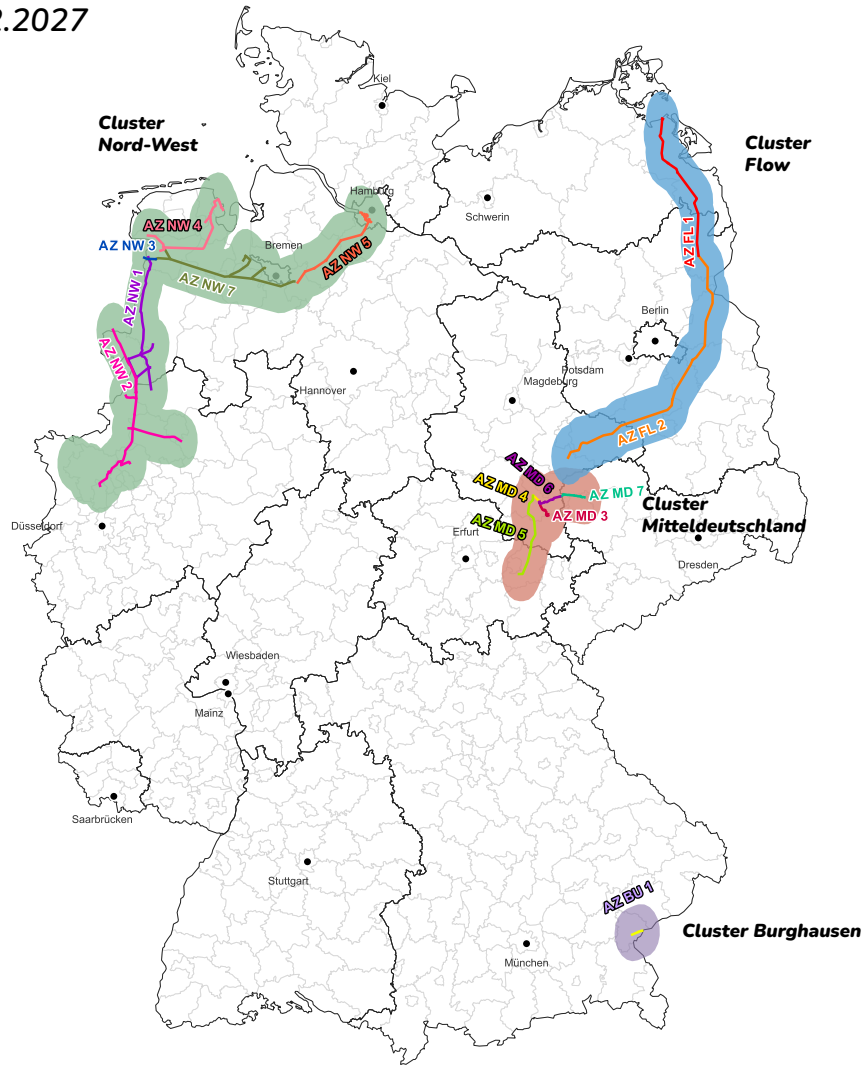

*31.12.2026*



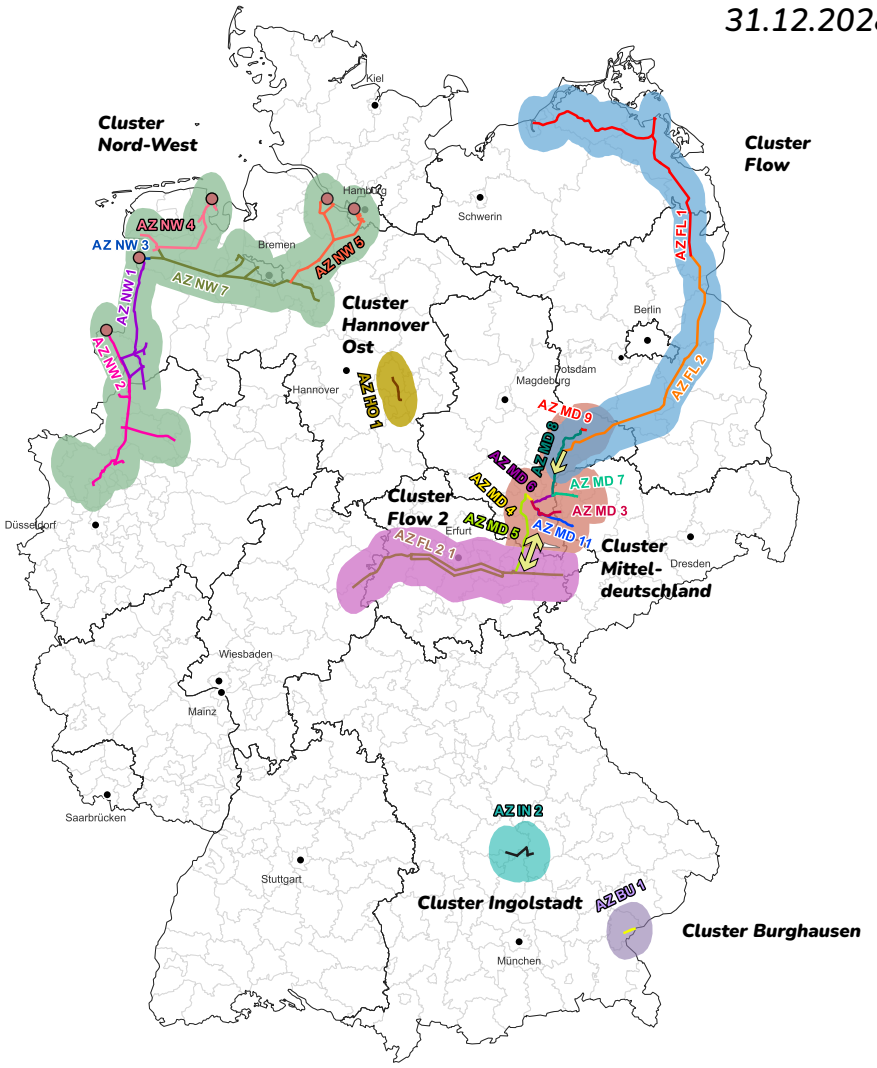
# Development of clusters and offer zones by 2030

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*



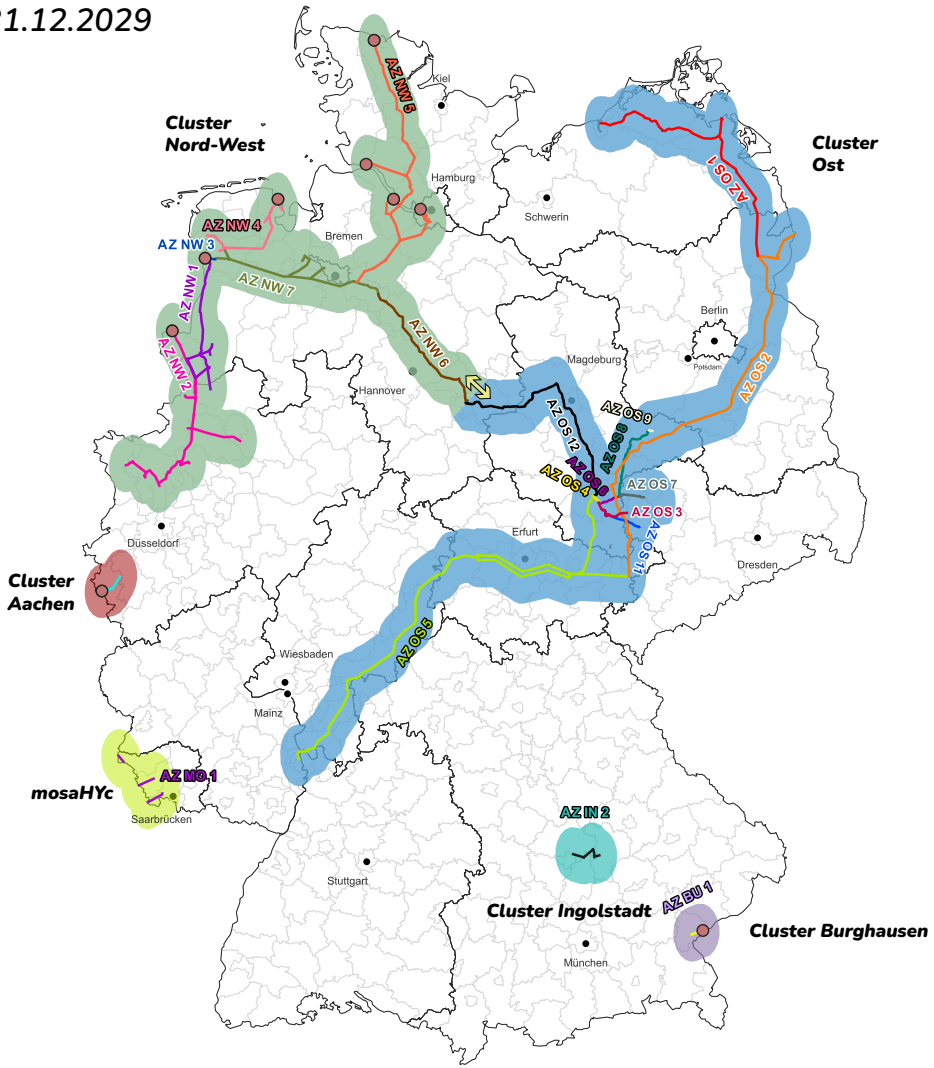

*Cross-cluster transport*

*Interconnection points and H2 terminals*

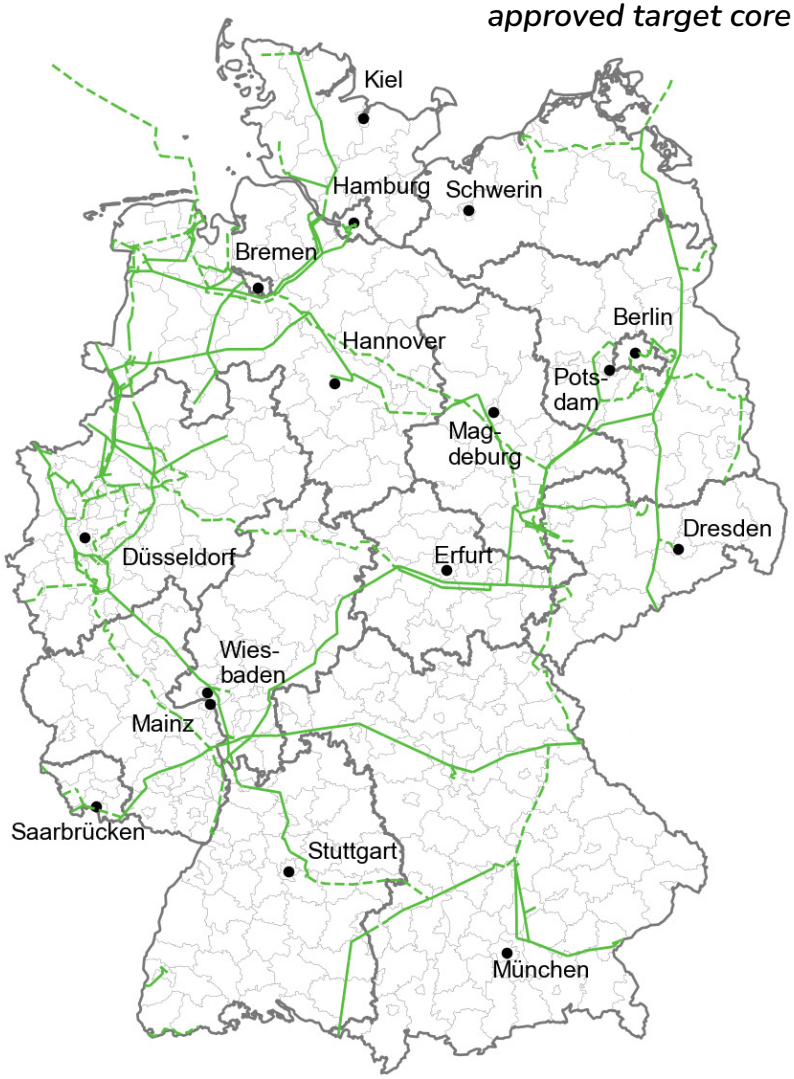
# Development of clusters and offer zones by 2030

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*