

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND .....	1
GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	1
SCOPE OF REPORT .....	1
METHODOLOGY AND INFORMATION SOURCES.....	2
ANALYST CREDENTIALS.....	2
RELATED BCC REPORTS .....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER .....	4
CHAPTER TWO: EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE BUILDING THE HYDROGEN ECONOMY:     PROJECTED GLOBAL INVESTMENTS IN PLANT AND     EQUIPMENT, THROUGH 2015 (\$ MILLIONS)</i> .....	5
<i>SUMMARY FIGURE BUILDING THE HYDROGEN ECONOMY:     TRENDS IN TECHNOLOGY SHARES, 2009 AND 2015     (PERCENTAGE OF TOTAL INVESTMENTS IN PLANT AND     EQUIPMENT)</i> .....	6
CHAPTER THREE: OVERVIEW .....	7
THE HYDROGEN ECONOMY .....	7
DEFINITIONS .....	7
CHARACTERISTICS OF HYDROGEN.....	7
GLOBAL CONSUMPTION OF HYDROGEN .....	8
<i>FIGURE 1 GLOBAL HYDROGEN CONSUMPTION, 2009     (PERCENTAGE OF TOTAL CONSUMPTION)</i> .....	8
<i>TABLE 1 GLOBAL HYDROGEN CONSUMPTION, THROUGH 2015     (MILLION TONS/\$ BILLION)</i> .....	9
<i>FIGURE 2 GLOBAL HYDROGEN CONSUMPTION TRENDS, 2009-2015     (MILLION TONS)</i> .....	9
RATIONALE FOR A HYDROGEN ECONOMY.....	10
Economic .....	10
Environmental.....	10
Energy Security .....	11
Economic Development .....	12
Other Socio-Economic Impacts .....	12
TECHNOLOGIES.....	12
HYDROGEN PRODUCTION TECHNOLOGIES.....	12
HYDROGEN STORAGE TECHNOLOGIES .....	13
HYDROGEN DISTRIBUTION TECHNOLOGIES .....	14
ELECTROCHEMICAL ENERGY CONVERSION TECHNOLOGIES.....	14
DIRECT HYDROGEN COMBUSTION TECHNOLOGIES .....	15
OTHER TECHNOLOGIES.....	15

MARKET SUMMARY.....	15
<i>TABLE 2 BUILDING THE HYDROGEN ECONOMY: TECHNOLOGY INVESTMENTS, THROUGH 2015 (\$ MILLION)</i> .....	16
<i>FIGURE 3 BUILDING THE HYDROGEN ECONOMY: TECHNOLOGY SHARES, 2009-2015 (PERCENTAGE OF TOTAL INVESTMENTS)</i> .....	16
<i>FIGURE 3 (CONTINUED)</i> .....	17
 CHAPTER FOUR: GOVERNMENT-SUPPORTED HYDROGEN	
INITIATIVES .....	18
UNITED STATES .....	18
FEDERAL INITIATIVES .....	18
Department of Energy .....	18
<i>FIGURE 4 U.S. DEPARTMENT OF ENERGY HYDROGEN/FUEL CELLS FUNDING, FY2004-FY2011 (\$ MILLION)</i> .....	19
<i>FIGURE 5 EERE HYDROGEN BUDGET, FY 2011 (% OF TOTAL EERE HYDROGEN BUDGET)</i> .....	20
<i>FIGURE 5 (CONTINUED)</i> .....	21
Other U.S. Government Programs and Initiatives .....	21
STATE INITIATIVES .....	21
California .....	22
New York .....	23
Florida.....	24
Other States.....	25
REGIONAL INITIATIVES .....	26
The Clean Energy States Alliance .....	26
Southern Hydrogen and Fuel Cell Coalition .....	26
EUROPEAN UNION.....	27
EU PROGRAMS .....	27
EU Framework Program.....	27
<i>FIGURE 6 EU INVESTMENTS IN HYDROGEN AND FUEL CELL RESEARCH, 1986-2006 (MILLION EUROS)</i> .....	28
<i>FIGURE 7 EU FP6 HYCROGEN INVESTMENTS BY AREA (% OF TOTAL HYDROGEN INVESTMENTS)</i> .....	29
CO <sub>2</sub> Emissions Restrictions.....	30
EU MEMBER STATES.....	30
Germany.....	30
France .....	31
Italy .....	32
Denmark .....	33
Japan.....	33
China.....	34
India .....	34
Other Countries .....	35
Australia.....	35
Canada .....	35

Iceland .....	36
Korea .....	37
Russia .....	37
INTERGOVERNMENTAL PROGRAMS.....	37
U.S.-EU COLLABORATION .....	38
INTERNATIONAL PARTNERSHIP FOR THE HYDROGEN ECONOMY.....	38
INTERNATIONAL ENERGY AGENCY HYDROGEN COORDINATION GROUP .....	39
CHAPTER FIVE: HYDROGEN PRODUCTION.....	40
SUMMARY.....	40
PRINCIPAL TECHNOLOGIES .....	40
THERMAL PROCESSES.....	40
<i>TABLE 3 THERMAL PROCESSES FOR THE PRODUCTION OF         HYDROGEN.....</i>	<i>40</i>
<i>TABLE 3 (CONTINUED).....</i>	<i>41</i>
Steam Reforming of Natural Gas.....	41
Partial Oxidation .....	42
Autothermal Reforming .....	43
Coal Gasification.....	43
FutureGen .....	44
Carbon Black and Hydrogen Process.....	45
Biomass Gasification .....	46
Gasification with Oxygen .....	47
HydroMax Process .....	47
Startech Process.....	48
Pyrolysis .....	48
NREL/Eprida Process .....	48
Reforming of Renewable Liquid Fuels.....	49
ECD Ovonics .....	49
HTC Pureenergy .....	50
Innovatek .....	50
High Temperature Water Splitting .....	50
Sulfur-Iodide Cycle .....	51
ELECTROLYTIC PROCESSES .....	51
<i>TABLE 4 ELECTROLYTIC PROCESSES FOR THE PRODUCTION OF         HYDROGEN.....</i>	<i>52</i>
Conventional Electrolysis.....	52
High Temperature Electrolysis.....	52
Solid Oxide Electrolysis Cells.....	53
Energy Sources .....	54
Nuclear Reactors .....	54
Solar Concentrators .....	54
Technological Challenges .....	55

Other Electrolytic Technologies for Hydrogen Production .....	55
Hybrid Thermochemical/Electrolytic Processes .....	55
Hybrid Sulfur Process.....	55
SRI Process .....	56
PHOTOLYTIC PROCESSES.....	56
<i>TABLE 5 PHOTOLYTIC PROCESSES FOR THE PRODUCTION OF</i>	
<i>HYDROGEN</i> .....	56
Photoelectrochemical Water Splitting .....	57
Photobiological Water Splitting .....	58
OTHER TYPES OF PROCESS.....	59
“Dark” Fermentation .....	59
PATENT ANALYSIS .....	60
PATENTS BY TECHNOLOGY TYPE.....	60
<i>FIGURE 8 U.S. HYDROGEN PRODUCTION PATENTS ISSUED, BY</i>	
<i>TYPE OF TECHNOLOGY 1975-2009 (PERCENTAGE OF TOTAL</i>	
<i>HYDROGEN PATENTS ISSUED)</i> .....	61
<i>FIGURE 8 (CONTINUED)</i> .....	62
PATENT TRENDS OVER TIME.....	62
<i>TABLE 6 U.S. HYDROGEN PRODUCTION PATENTS ISSUED PER</i>	
<i>YEAR, 2002-2009 (NUMBER OF PATENTS)</i> .....	62
<i>TABLE 6 (CONTINUED)</i> .....	63
<i>FIGURE 9 TRENDS IN U.S. HYDROGEN PRODUCTION PATENTS</i>	
<i>ISSUED ANNUALLY, 2002-2009 (NUMBER OF PATENTS)</i> .....	63
MAJOR IP PORTFOLIOS .....	64
<i>FIGURE 10 MAJOR HYDROGEN PRODUCTION IP PORTFOLIOS</i>	
<i>ISSUED 1975-2009 (PERCENTAGE OF U.S. HYDROGEN</i>	
<i>PRODUCTION PATENTS)</i> .....	64
<i>FIGURE 10 (CONTINUED)</i> .....	65
MARKETS.....	65
<i>TABLE 7 MARKET FOR EQUIPMENT USED TO GENERATE</i>	
<i>HYDROGEN FOR DIRECT ENERGY APPLICATIONS, THROUGH</i>	
<i>2015 (\$ MILLION)</i> .....	66
LARGE/CENTRALIZED HYDROGEN PLANTS .....	66
Large/Centralized ... (Continued).....	67
<i>TABLE 8 PROJECTED EXPENDITURES ON CONSTRUCTION OF</i>	
<i>LARGE/CENTRALIZED HYDROGEN POWER PLANTS,</i>	
<i>THROUGH, 2009-2015 (\$ MILLION)</i> .....	68
DECENTRALIZED HYDROGEN PRODUCTION.....	68
External Fuel Cell Reformers .....	68
<i>TABLE 9 GLOBAL MARKET FOR FUEL CELL REFORMERS,</i>	
<i>THROUGH 2015 (\$ MILLION)</i> .....	69
Hydrogen Stations.....	69
CHAPTER SIX: HYDROGEN STORAGE.....	70
SUMMARY.....	70

PRINCIPAL TECHNOLOGIES .....	70
<i>TABLE 10 U.S. DEPARTMENT OF ENERGY TARGETS FOR ON-BOARD HYDROGEN STORAGE SYSTEMS</i> .....	70
<i>TABLE 11 HYDROGEN STORAGE TECHNOLOGIES</i> .....	71
DIRECT STORAGE OF HYDROGEN .....	71
Gaseous Storage .....	72
Current Gaseous Hydrogen Storage Technology.....	72
Geologic Bulk Storage Systems.....	72
Liquid Storage .....	73
BMW Dual Fuel Thermo-Tank .....	73
Future Developments .....	74
HYDROCARBONS.....	74
Technologies.....	74
Onboard Reforming of Hydrocarbons.....	74
Approaches to Onboard Reforming .....	75
External Reforming .....	75
Internal Reforming.....	75
Advantages and Disadvantages of On-Board Reforming.....	76
Commercial Status of Onboard Reforming.....	76
IdaTech .....	76
Innovatek.....	77
Direct Hydrocarbon Fuel Cells.....	77
Types of Direct Hydrocarbon Fuel Cells .....	77
Direct Methanol Fuel Cells.....	77
Direct Ethanol Fuel Cells.....	78
Advantages and Disadvantages of Direct Hydrocarbon Fuel Cells .....	79
Commercial Status of Direct Hydrocarbon Fuel Cells .....	79
AMMONIA STORAGE.....	79
Ammonia-Borane Storage .....	80
Ammonia-Sea Salt Storage .....	81
METAL HYDRIDES .....	81
General Principles .....	81
Types of Metal Hydrides .....	82
Advantages and Disadvantages for Hydrogen Storage .....	82
Commercial Status .....	83
ZEOLITES .....	83
General Principles .....	83
Types of Zeolites .....	84
ZK-5 .....	84
CD-Exchanged Rho Zeolite.....	84

Magnesium-Optimized Zeolites for Hydrogen Storage .....	84
Other Zeolites.....	84
OTHER NANOSTRUCTURED MATERIALS .....	85
Carbon Nanotubes/Buckyballs.....	85
Metal-Organic Frameworks .....	86
OTHER STORAGE TECHNOLOGIES .....	87
Phosphonium Borate .....	87
Polymers.....	87
Polymers of Intrinsic Microporosity.....	88
Conformal Polymeric Foams .....	88
Ethylene .....	89
Hollow Glass Microspheres .....	89
PATENT ANALYSIS .....	89
PATENTS BY TECHNOLOGY TYPE.....	89
<i>FIGURE 11 U.S. HYDROGEN STORAGE PATENTS BY TYPE OF TECHNOLOGY (PERCENTAGE OF PATENTS ISSUED TO DECEMBER 2009).....</i>	<i>90</i>
PATENT TRENDS OVER TIME.....	90
<i>TABLE 12 U.S. HYDROGEN STORAGE PATENTS ISSUED PER YEAR, 2002-2009 (NUMBER OF PATENTS).....</i>	<i>91</i>
<i>FIGURE 12 TRENDS IN U.S. HYDROGEN STORAGE PATENTS ISSUED ANNUALLY, 2002 -2009 (NUMBER OF PATENTS).....</i>	<i>91</i>
MAJOR IP PORTFOLIOS .....	92
<i>FIGURE 13 MAJOR HYDROGEN STORAGE IP PORTFOLIOS ISSUED, 1975-2006 (PERCENTAGE OF U.S. HYDROGEN STORAGE PATENTS).....</i>	<i>92</i>
<i>FIGURE 13 (CONTINUED) .....</i>	<i>93</i>
MARKETS.....	93
SUMMARY .....	93
<i>TABLE 13 MARKET FOR HYDROGEN STORAGE TECHNOLOGIES*, THROUGH 2015 (\$ MILLION).....</i>	<i>93</i>
PRESSURIZED STORAGE CYLINDERS .....	94
<i>TABLE 14 MARKET FOR PRESSURIZED CYLINDERS USED TO STORE HYDROGEN, THROUGH 2015 (\$ MILLION).....</i>	<i>94</i>
HYDROGEN FUEL TANKS.....	94
<i>TABLE 15 MARKET FOR HYDROGEN FUEL TANKS USED IN MOBILE APPLICATIONS, THROUGH 2015* (\$ MILLION).....</i>	<i>95</i>
CHAPTER SEVEN: BULK HYDROGEN DISTRIBUTION.....	96
SUMMARY.....	96
PRINCIPAL TECHNOLOGIES .....	96
TANK TRUCKS, RAILCARS, BARGES .....	96
TUBE TRAILERS .....	97
PIPELINES .....	97

New Hydrogen Pipeline Materials.....	98
Mixed Hydrogen/Natural Gas Pipelines.....	99
Commingled Hydrogen and Natural Gas .....	100
Alternating Hydrogen and Natural Gas .....	100
Other Technical Issues .....	100
Effect of Hydrogen Exposure on Pipeline Materials .....	101
Hydrogen Permeation and Leaks.....	101
Compression Technology .....	102
Single Screw Hydrogen Compressor .....	102
Hydride Based Hydrogen Compression .....	102
Advanced Centrifugal Compressor .....	103
Electrochemical Compressor .....	103
Advanced Materials for Compressors .....	103
Alternatives to Transmission of Gaseous Hydrogen.....	103
HYDROGEN STATIONS.....	103
Hydrogen Filling Stations .....	104
Mobile Hydrogen Refuelers .....	105
Hydrogen Home Stations .....	105
PATENT ANALYSIS .....	106
PATENTS BY TYPE OF TECHNOLOGY .....	106
<i>FIGURE 14 U.S. HYDROGEN TRANSMISSION AND DISTRIBUTION</i>	
<i>TECHNOLOGY PATENTS ISSUED TO DECEMBER 2009, BY TYPE</i>	
<i>OF TECHNOLOGY (PERCENTAGE OF TOTAL PATENTS ISSUED) .....</i>	<i>106</i>
PATENTS BY ASSIGNEE.....	107
<i>FIGURE 15 U.S. HYDROGEN TRANSMISSION AND DISTRIBUTION</i>	
<i>TECHNOLOGY PATENTS ISSUED TO DECEMBER 2009, BY</i>	
<i>ASSIGNEE (PERCENTAGE OF TOTAL PATENTS ISSUED).....</i>	<i>107</i>
MARKETS.....	108
<i>TABLE 16 GLOBAL MARKET FOR HYDROGEN TRANSMISSION AND</i>	
<i>DISTRIBUTION TECHNOLOGIES, THROUGH 2015 (\$ MILLION).....</i>	<i>108</i>
TRANSMISSION .....	108
<i>FIGURE 16 SOURCES OF HYDROGEN FUEL FOR EXISTING AND</i>	
<i>PLANNED HYDROGEN FILLING STATIONS, 2009 (PERCENTAGE</i>	
<i>OF ALL EXISTING AND CURRENTLY PLANNED HYDROGEN</i>	
<i>STATIONS).....</i>	<i>109</i>
Liquid Hydrogen Tankers .....	109
<i>TABLE 17 LIQUID HYDROGEN TANKER TRUCK MARKET,</i>	
<i>THROUGH 2015 (UNITS/\$ MILLION).....</i>	<i>110</i>
Tube Trailers .....	110
<i>TABLE 18 COMPRESSED HYDROGEN TUBE TRAILER MARKET,</i>	
<i>THROUGH 2015 (UNITS/\$ MILLION).....</i>	<i>111</i>
Pipelines.....	111
HYDROGEN STATIONS.....	111

TABLE 19 HYDROGEN STATION MARKET, THROUGH 2015 (NUMBER OF STATIONS/\$ MILLION).....	112
Hydrogen Filling Stations .....	112
TABLE 20 GLOBAL INVESTMENTS IN NEW HYDROGEN FUELING STATIONS, THROUGH 2015 (UNITS/\$ MILLION) .....	113
Hydrogen Home Stations .....	113
TABLE 21 PROJECTED GLOBAL PURCHASES OF HYDROGEN HOME STATIONS, THROUGH 2015 (UNITS/\$ MILLION).....	113
CHAPTER EIGHT: ELECTROCHEMICAL ENERGY CONVERSION .....	114
SUMMARY.....	114
PRINCIPAL TECHNOLOGIES .....	114
DESCRIPTION.....	114
FIGURE 17 FUEL CELL PRINCIPLES.....	114
MAIN TECHNOLOGIES.....	115
TABLE 22 MAJOR FUEL CELL TECHNOLOGIES .....	115
Polymer Electrolyte Membrane Fuel Cells.....	116
Direct Methanol Fuel Cells .....	116
Alkaline Fuel Cells .....	117
Phosphoric Acid Fuel Cells.....	118
Molten Carbonate Fuel Cells .....	118
Molten Carbonate ... (Continued) .....	119
Solid Oxide Fuel Cells .....	120
PATENT ANALYSIS .....	120
PATENTS BY TECHNOLOGY TYPE.....	121
FIGURE 18 U.S. FUEL CELL PATENTS BY TYPE OF TECHNOLOGY (PERCENTAGE OF PATENTS ISSUED TO DECEMBER 2009).....	121
PATENT TRENDS OVER TIME.....	121
TABLE 23 U.S. FUEL CELL PATENTS ISSUED PER YEAR, 2002-2009 (NUMBER OF PATENTS) .....	122
FIGURE 19 TRENDS IN U.S. FUEL CELL PATENTS ISSUED ANNUALLY, 2002-2009 (NUMBER OF PATENTS) .....	122
MAJOR IP PORTFOLIOS .....	123
FIGURE 20 MAJOR FUEL CELL IP PORTFOLIOS ISSUED TO 2009 (PERCENTAGE OF U.S. HYDROGEN STORAGE PATENTS .....	123
FIGURE 20 (CONTINUED) .....	124
MARKETS.....	124
TABLE 24 FUEL CELL SALES BY TYPE OF APPLICATION, THROUGH 2015 (\$ MILLION).....	124
FIGURE 21 GLOBAL FUEL CELL SALES, 2009-2015 (\$ MILLION) .....	125
FIGURE 22 FUEL CELL MARKET SHARES BY APPLICATION SEGMENT, 2009-2015 (PERCENTAGE OF TOTAL DOLLAR SALES).....	126
CHAPTER NINE: DIRECT COMBUSTION OF HYDROGEN .....	127
SUMMARY.....	127



TECHNOLOGIES .....	127
INTERNAL COMBUSTION ENGINES .....	127
Hydrogen Internal Combustion Engines.....	127
BMW Dual-Fuel Technology .....	127
Ford/Mazda Technology.....	128
Hybrid Hydrogen-Electric Propulsion Systems.....	129
Hydrogen Boosted Gasoline Engines .....	129
TURBINES .....	130
PATENTS.....	131
MARKETS.....	131
<i>TABLE 25 MARKET FOR DIRECT HYDROGEN COMBUSTION</i>	
<i>TECHNOLOGIES, THROUGH 2015 (\$ MILLION)</i> .....	132
HYDROGEN INTERNAL-COMBUSTION ENGINES .....	132
<i>TABLE 26 MARKET FOR DIRECT HYDROGEN COMBUSTION</i>	
<i>ENGINES, THROUGH 2015 (UNITS/\$ MILLION)</i> .....	133
HYDROGEN TURBINES .....	133
<i>TABLE 27 MARKET FOR LARGE HYDROGEN TURBINES USED TO</i>	
<i>GENERATE ELECTRICITY, THROUGH 2015 (\$ MILLION)</i> .....	133
CHAPTER TEN: OTHER HYDROGEN-RELATED TECHNOLOGIES.....	134
HYDROGEN SENSORS .....	134
TECHNOLOGIES .....	134
MEMS Hydrogen Sensors .....	134
Hydrogen Nanosensors.....	135
Nanoscale Palladium Thin Film Sensors.....	136
Carbon Nanotube-Based Hydrogen Sensors.....	136
Titania Nanotube-Based Hydrogen Sensors .....	137
Nanowire-Based Hydrogen Sensors.....	137
PATENTS.....	137
<i>FIGURE 23 HOLDERS OF U.S. HYDROGEN SENSOR PATENTS</i>	
<i>(PERCENTAGE OF TOTAL PATENTS ISSUED TO DECEMBER</i>	
<i>2009)</i> .....	138
MARKETS.....	138
<i>TABLE 28 MARKET FOR HYDROGEN SENSORS, THROUGH 2015 (\$</i>	
<i>MILLION)</i> .....	139
CHAPTER ELEVEN: COMPANY PROFILES.....	140
ACTA SPA .....	140
ADVANCED MATERIALS CORP.....	140
AIR PRODUCTS AND CHEMICALS, INC. ....	141
ALCHEMIX CORP.....	141
AMMINEX A/S.....	142
ARVINMERITOR, INC.....	143
AVALENCE LLC .....	143
BALLARD POWER SYSTEMS .....	143

BAYERISCHE MOTOREN WERKE AG .....	144
CERAMATEC.....	144
DIVERSIFIED ENERGY CORP .....	145
DYNETEK INDUSTRIES LTD.....	145
ECD OVONICS .....	146
E. I. DU PONT DE NEMOURS AND COMPANY .....	147
ENGINEERED GAS SYSTEMS (EGS) .....	147
EPRIDA, INC .....	148
ERGENICS.....	148
ETUDES CHEMIQUES ET PHYSIQUES SARL.....	149
FOSTER WHEELER CORP.....	149
FUEL CELL ENERGY, INC. ....	149
GENERAL ATOMICS.....	150
H2GEN INNOVATIONS, INC .....	150
H2SCAN .....	150
HALDOR TOPSØE A/S .....	151
HCE LLC .....	151
HTC PUREENERGY.....	152
HY9 CORP.....	153
HYDROGENICS CORP.....	153
HYRADIX INC.....	154
IDATECH LLC.....	154
INERGY AUTOMOTIVE SYSTEMS .....	155
INNOVATEK, INC .....	155
LINDE AG.....	156
LURGI GMBH.....	156
MAGNA STEYR AG & CO. KG.....	156
MAKEL ENGINEERING, INC .....	157
MATERIALS AND SYSTEMS RESEARCH, INC.....	158
MEMBRANE TECHNOLOGY AND RESEARCH, INC .....	158
MO SCI CORP.....	159
NANOMIX, INC.....	159
PLUG POWER, LLC.....	159
POLYFUEL.....	160
PROTON ENERGY SYSTEMS, INC. ....	160
QUANTUM FUEL SYSTEMS TECHNOLOGIES WORLDWIDE, INC. ....	161
QUESTAIR TECHNOLOGIES .....	161
RELION INC.....	161
SECAT, INC.....	162
SOLAR SYSTEMS PTY.LTD. ....	162
SOTACARBO S.P.A.....	163
STARTECH ENVIRONMENTAL CORP.....	163
TECHNIP SA .....	164
UHDE GMBH .....	164

WELDSHIP CORP..... 164  
ZTEK COR..... 165