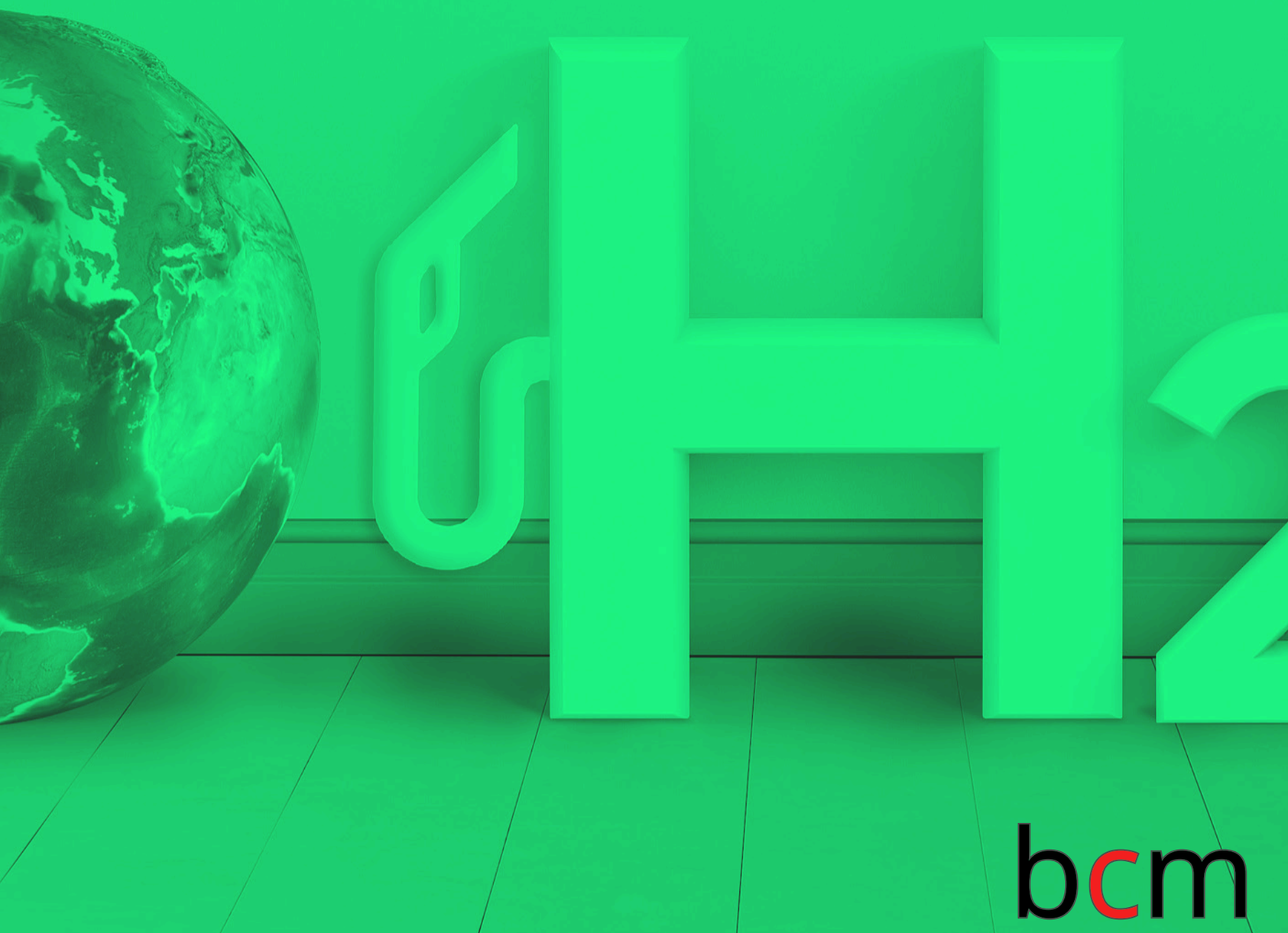
DECODING INFLUENCE

BCM MEDIA SHARE OF VOICE REPORT

The 2025 HYDROGEN EDITION



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Media visibility is not just a scoreboard, it is the arena where policy certainty, capital formation and industrial credibility are won or lost.

The State of Play in 2025

In 2025, the hydrogen conversation sharpened around a handful of dominant voices, even as oil geopolitics, trade tensions, and supply chain pressures pulled focus from clean-energy milestones. To help make sense of this shifting landscape, BCM Public Relations presents the latest BCM Media Share of Voice Report. A concise look at how the world's leading hydrogen players are shaping and commanding global media attention.

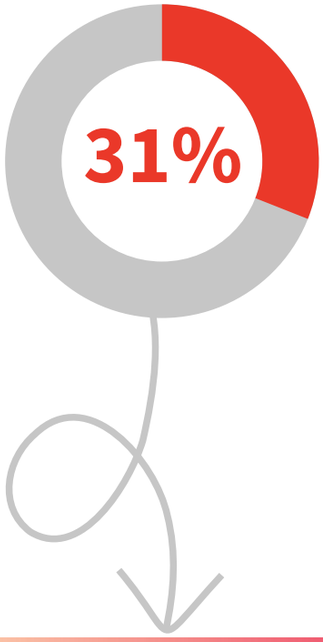
Research Methodology:

The analysis examines the world's most influential hydrogen players by tracking media coverage from January to October 2025 across selected global newswires and the top international energy and sustainability trade media.

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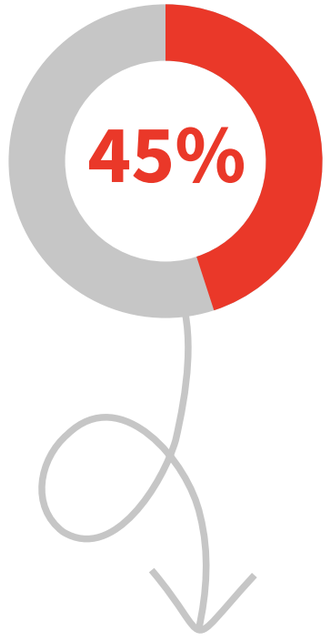
Key Findings

Concentration Intensifies at the Top



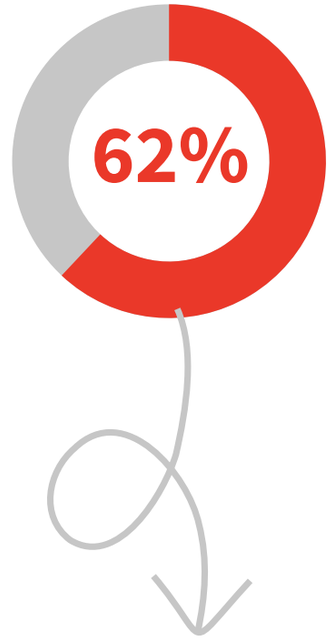
Top 5 Companies

Shell (10.9%) and BP (10.1%) anchor the conversation along with RWE, Siemens Energy and Plug Power



Top 10 Share

Nearly half of all sector visibility concentrated amongst ten players



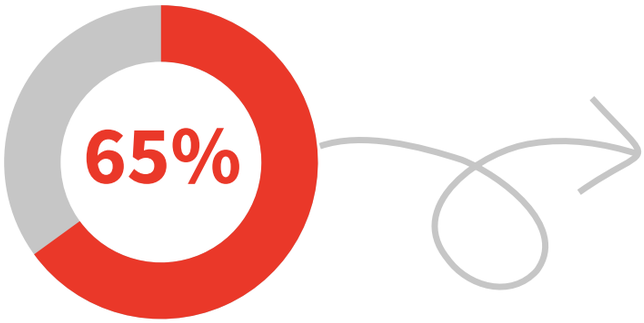
Top 20 Share

Up from 56% last year, evidencing further consolidation of narrative power

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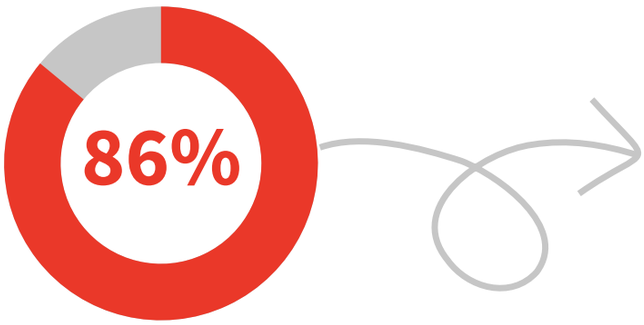
Key Findings

A Widening Visibility Gap



The Silent Majority Grows

Companies registered 0% share of voice in 2025, up from 53% in last year's analysis, highlighting a widening visibility gap.

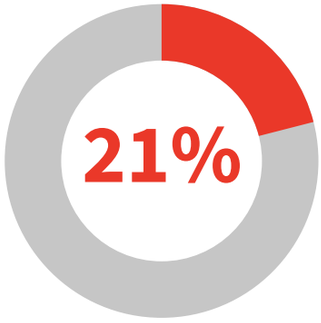


The top decile (10% of companies) now drives 86.1% of all sector visibility, evidence of a classic "head/long tail" media market.

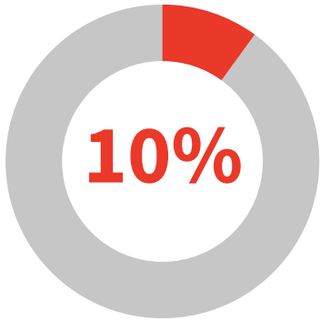
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Key Findings

Two Poles of Narrative Gravity



Oil Majors: Shell and BP draw on deep capital reserves, global reach, and decades of energy credibility to dominate headlines.



Industrial/Tech Challengers: RWE, Siemens and Plug Power represent the technology and industrial narrative.

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Key Findings

What Drove Attention in 2025

January: US 45V Clarity

1

Final clean hydrogen rules arrived, creating near-term investor and developer certainty—giving reporters hard, verifiable milestones to anchor stories.

May: European Hydrogen Bank

2

Second auction selected 15 projects for €992 million, sustaining Europe's production buildout narrative with concrete policy action.

July: German Core Network

3

Uniform ramp-up tariff set by regulator, advancing national infrastructure storyline from approval to implementation phase.

Q3–Q4: DOE Hub Reversals

4

Funding cancellations and cuts—including two West Coast hubs—shifted US headlines towards uncertainty, crowding out project-level progress.

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Key Findings

Trade Tensions Reshape the Narrative

EU Resilience Criteria

Auction terms cap electrolyser stack sourcing from China at 25% for funded projects—directly shaping procurement angles in coverage and forcing transparency on supply chains.

OIL GEOPOLITICS STILL SET THE WEATHER

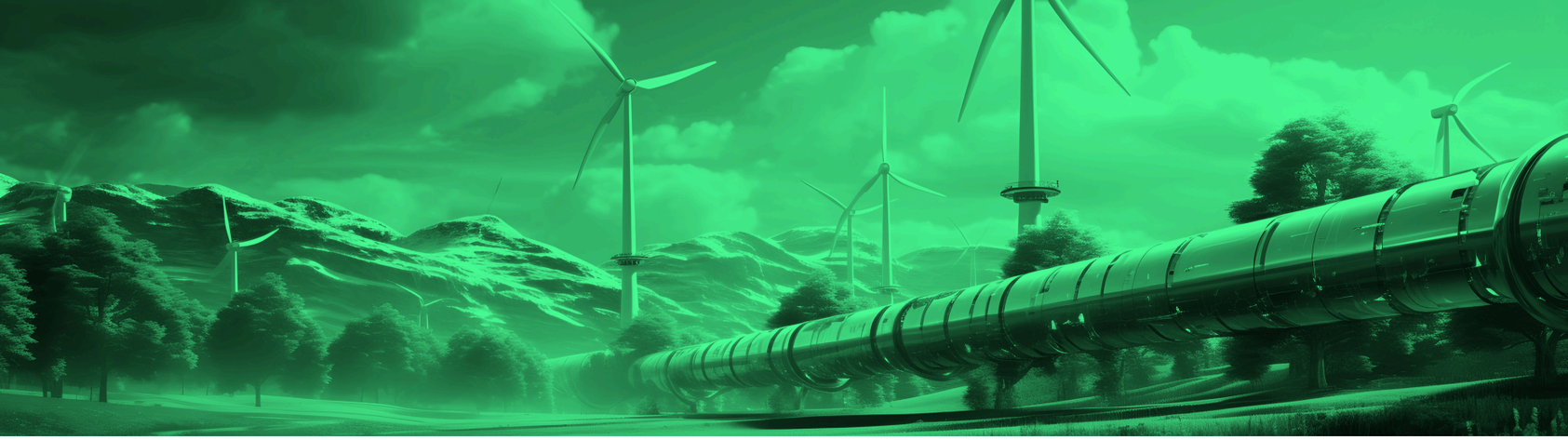
Tariffs Climate

Broader EU actions on Chinese clean tech (including definitive EV duties) and the wider 2025 tariff environment kept "trade war" frames in headlines that often spill over into hydrogen storylines.

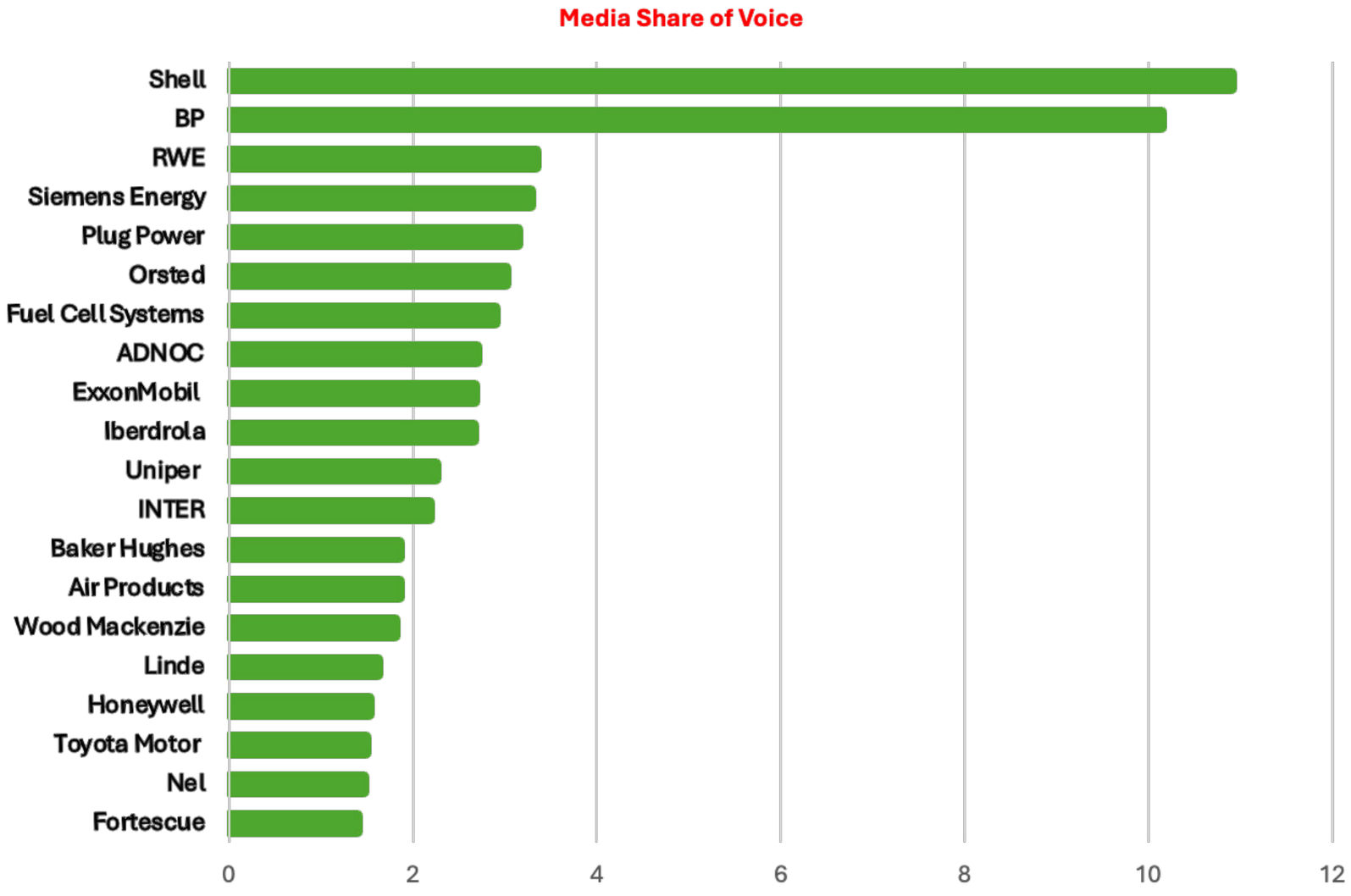
Supply Chain as Story

Resilience, dual sourcing and manufacturing location have evolved from back-office procurement topics to front-page strategic imperatives in editorial coverage.

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Top 20 Companies



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Remaining Companies

Company	Media SoV (%)	Company	Media SoV (%)	Company	Media SoV (%)
Schneider Electric	1.347499352	Hystar	0.224583225	SwitcH2	0.077740347
DNV	1.321585903	FORVIA Faurecia	0.207307593	Atlas Copco Gas and Process	0.077740347
ROSEN	1.166105209	Liebherr	0.207307593	Burckhardt Compression	0.077740347
Eaton	1.157467392	FABRUM	0.207307593	Enbridge Gas Inc	0.077740347
ITM Power	1.122916127	Resato	0.207307593	Center For Hydrogen Safety	0.077740347
Electric Hydrogen	1.097002678	Parker Hannifin	0.198669776	R2	0.069102531
Snam	1.071089229	Alfa Laval	0.181394144	Battolyser Systems	0.069102531
Envision Energy	1.010624514	HRS	0.181394144	Stiesdal	0.069102531
thyssenkrupp nucera	0.941521983	Advent Energy	0.172756327	H2SEA	0.069102531
Lhyfe	0.829230371	Vallourec	0.172756327	SOLATIO	0.069102531
Hanwha Power Systems	0.803316921	Petrofac	0.172756327	Howden	0.060464715
Port of Rotterdam	0.794679105	SBM Offshore	0.155480694	JOGMEC	0.060464715
FuelCell Energy	0.786041289	Chiyoda Corporation	0.155480694	HYDRASUN	0.060464715
TECHNIP ENERGIES	0.751490023	Intertek	0.155480694	Xylem	0.060464715
ENEOS	0.751490023	Yara Clean Ammonia	0.146842878	Yokogawa Europe B.V.	0.060464715
SEFE	0.742852207	Green Energy Park	0.146842878	Smartenergy	0.060464715
Accelera	0.699663125	POWER2X	0.146842878	John Crane	0.060464715
Vattenfall	0.691025309	HyCC	0.138205062	KHI	0.051826898
M3	0.578733696	GreenH	0.129567245	Pexapark	0.051826898
Chart Industries	0.57009588	NEUMAN & ESSER	0.129567245	nVent	0.051826898
Topsoe	0.552820247	EverWind Fuels	0.120929429	TUBOS REUNIDOS	0.051826898
SFC Energy	0.526906798	Chemours	0.120929429	World Energy GH2	0.043189082
Green Hydrogen Systems	0.483717716	Pattern Energy	0.120929429	EH GROUP	0.043189082
John Cockerill	0.4750799	Ansys	0.120929429	Hydrogen Optimized Inc	0.043189082
Kawasaki Heavy Industries	0.457804267	Tenaris	0.120929429	Forze Hydrogen Racing	0.043189082
Cepsa	0.457804267	PECEM	0.120929429	AERODELFT	0.043189082
Vopak	0.440528634	HYVIA	0.112291613	KEM	0.043189082
Asahi-Kasei	0.414615185	Hydrogenious LOHC	0.112291613	NIDEC INDUSTRIAL SOLUTIONS	0.043189082
Stargate Hydrogen	0.388701736	AGC	0.112291613	Hydrogen Mem-Tech	0.043189082
DENSO	0.388701736	HydePoint	0.112291613	Ebara Corporation	0.043189082
BLACK & VEATCH	0.38006392	HydroHub	0.112291613	Festo	0.043189082
NEDO	0.38006392	ZEPP SOLUTIONS	0.103653796	Jenbacher	0.034551265
HDF Energy	0.371426103	H2-Fuel	0.09501598	Endress+Hauser	0.034551265
Provaris Energy	0.362788287	PDC Machines	0.09501598	SVT GmbH	0.034551265
HydrogenPro	0.354150471	CPE	0.09501598	EcoLyzer	0.034551265
Hexagon Purus	0.336874838	Haskel	0.09501598	Triple Point Resources	0.034551265
Schaeffler	0.336874838	Sener	0.09501598	Abraxas	0.034551265
A.P. Møller – Mærsk	0.310961389	Ramboll	0.09501598	Cipher Neutron	0.025913449
Gasgrid Finland	0.302323573	Chesterfield Special Cylinders	0.09501598	COWI	0.025913449
Ohmium International	0.293685756	MAXIMATOR	0.09501598	HyGear	0.025913449
Clean Power Hydrogen (CPH	0.293685756	LRQA	0.09501598	Nippon Export and Investment	0.025913449
Andritz	0.28504794	EA Elektro-Automatik GmbH	0.086378164	Royal HaskoningDHV	0.025913449
Veolia	0.28504794	CRI	0.086378164	KAPP	0.025913449
BASQUE HYDROGEN CORRI	0.28504794	Pall Corporation	0.086378164	NITTO	0.025913449
Elcogen	0.267772307	KK Wind Solutions	0.086378164	BPT	0.025913449
IHI Corporation	0.267772307	NV Nederlandse Gasunie	0.077740347	Port of Belledune	0.025913449
Elogen	0.259134491	Axens	0.077740347	8 Rivers	0.017275633
Nikkiso	0.259134491	2G Energy	0.077740347	H-TEC SYSTEMS	0.017275633
H2SITE	0.250496674	Q Power	0.077740347	HyET Hydrogen	0.017275633
FEST	0.233221042	Advario	0.077740347	Mott Corporation	0.017275633

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No Media Visibility

Companies with No Media Share of Voice			
Technical Elements	Dräger Nederland B.V.	Missie H2	Tractebel Engineering
TUBACEX	Duiker Clean Technologies	Mitsubishi Nederland	Trelleborg Marine & Infrastructure
Proton Ventures	duisport – Duisburger Hafen AG	Molecular Products	Universal H2
H2scan	duisport industrial solutions	Morgan Advanced Materials	Utilitas
Sakowin	Dynex Semiconductor	MSA Safety Company	Valmet Automation
BECHT	Endurance Energy	Munk GmbH	Van Leeuwen Pipe & Tube
HSL Technologies	ENVIROWATER GROUP	Munsch Chemie-Pumpen GmbH	VDMA P2X4A
Lamons	Equnior	NANOGAP	VEGA Grieshaber KG
Bear Head Energy	EUROWATER	Neohance	Zhejiang Rein Hytec
INVESTE PIAUI	Evides Industriewater	NevadaNano	Vögtlin
Niras	EVREC	Neway Valve	VONK
TB Global Technologies Ltd	Exion Hydrogen	Next Hydrogen Corp	WALDEMAR PRUSS ARMATURENFABRIK
FIEC	Faber Cylinders	Omega Air	Wessington Cryogenics
Hanwha Cimarron	Feintool International Holding AG	ON2Quest	Westenergie
AERZEN	Fukui Seisakusho	Othersphere	WEW
ANTONIUS	GEORG FISCHER N.V.	OVIVO	WIKA Alexander Wiegand SE & Co
FEV Europe GmbH	Gevasol Group	PD Gas Technology	Wuxi Prime Material
HARTING	Gielissen	Petrogas Piping	Tankbouw Rootselaar
Oostendorp	GKD - GEBR. KUFFERATH	Phoenix Contact B.V.	TanQuid
Transform Materials LLC	GMH Gruppe	Plasticon Composites	Tata Consulting
Twinning Energy	Green Team Twente	Port of Vlissingen, Terneuzen & Ghent	Teesing
AEP Hybrid Power	GRUNBECK WASSERAUFBEREITUNG	Process Control Equipment Benelux	TLK
Alphatec Engineering	GSR VENTILTECHNIK	Process Sensing Technologies	Klaus Union GmbH & Co. KG
Amnis Pura	Hale Hamilton	Prodrive Technologies	Koso Kent Introl
Angst+Pfister	HAVER & BOECKER	Pure Water Group	Luxfer Gas Cylinder Limited
apexBrasil	Hengst Filtration	R. STAHL	MARIA CRISTINA BAROUDI
Avantium Chemicals	Hetraco	REDCOM	Mehrer Compression
AVK Industrial	Hubei Green Power	Rittal GmbH & Co. KG	MINECHAIN
BAEKEN	Hunter Buildings International	Roxtec International	Cryovat Productie
Baltimore Aircoil Company	Hydrogen Metropole Ruhr	Royal Dahlman	CRYOWORLD
BOMAX	Hydrotechnik UK Test Engineering Ltd	Samson Regeltechniek	Dassault Systems
BOSS Energy Consulting	Hygreen Energy	SCHUBERT & SALZER BENELUX	De Jong Energy Services
Brainport Eindhoven	Hystream Developments	Schwer Fittings	Demaco Hydrogen
Brand Control Rooms	Imodco	Senior Flexonics	Distran
Bronkhorst BV	INRAG	Shijiazhuang Enric Gas Equipment	Dongyue Chemical
BW-i	Integrative Nanotech	Shuangliang Hydrogen Energy Technology	Stirling Cryogenics
Celme Transformers	InterDam	Sierra Instruments	Symbase S.A.
Comburex	Ivys Adsorption	Sino-Tech Hydrogen	Kelvion Thermal Solutions Holding
Concord Blue	J De Jonge	SMA Altenso	Kiwa Technology
Condensator Dominit	Jiangsu Skyblue Smart Equipment Co.,Ltd	SoluForce B.V.	Crowcon
Conovalve Control Valves	JIANGSU YUANZHUO EQUIPMENT MANUFACTURING	Sorst Streckmetall	Cryonorm
CPU Hydrogen Power Technology	Keller Pressure Sensors	Source3 X	

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Why Media Visibility Matters in 2026

Media as Market Signal

Consistent visibility correlates with policy influence, capital allocation decisions and talent attraction. making share of voice a leading indicator of commercial momentum.

Breaking Through Competing Narratives

As oil market storylines, tariffs and trade disputes filter into clean tech supply chains, companies must anchor coverage to verifiable milestones and security-of-supply framing.

The Stakes Are Rising

With the gap widening between the visible few and the silent majority, the cost of invisibility grows, losing ground in 2025 makes recovery in 2026 exponentially harder.

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