

Les enjeux des minéraux critiques et stratégiques dans la filière hydrogène



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Université
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Journée bretonne Hydrogène R&D - Industries - formations

Piliers du développement de la filière hydrogène et piles à combustible en Bretagne

Jeudi 29 mai 2024 sur le campus de l'IUT et l'ENSM 38-40 Rue de la croix Desilles 35400 Saint Malo



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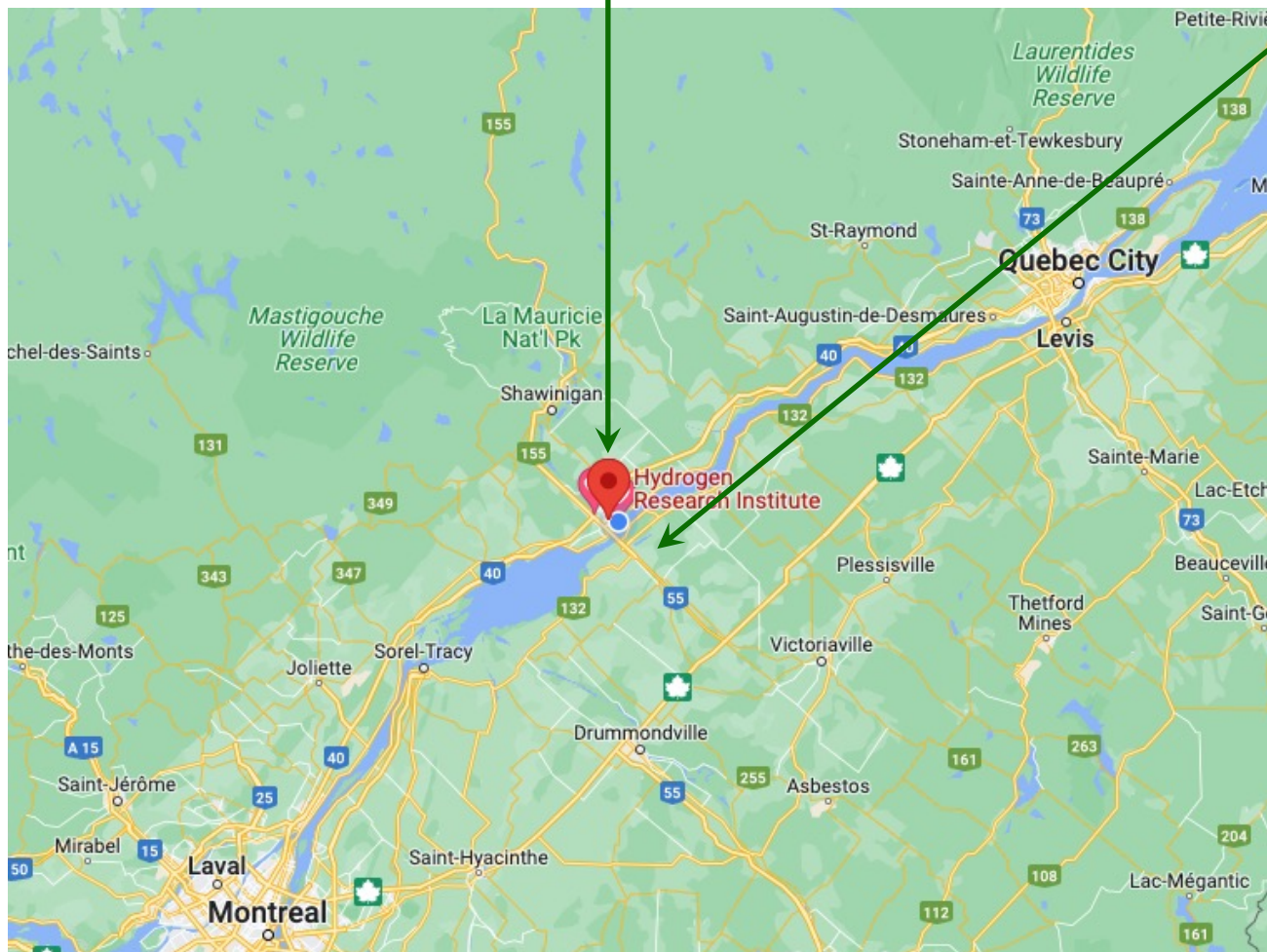
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- **Air Liquide Hydrogen plant** - Home of the largest PEMWE electrolyser capacity (20MW, Cummins/Hydrogenics) in the world.
- **Innovation Zone** - Industrial Park on Decarbonation and Electrification.



RESEARCH AREAS

ELECTROLYSERS

Catalysts containing non-critical and strategic metals mined in Canada, Membranes, Electrodes, Transport layers, Bipolar plates, etc

PEM FUEL CELLS

Catalysts containing non-critical and strategic metals mined in Canada, Membranes, Electrodes, Bipolar plates, etc

TECHNO-ECONOMICS

Environmental Life Cycle Assessment and Techno-Economic Analysis

MATERIAL DISCOVERY

DFT Modeling, Artificial Intelligence

CO₂ VALORIZATION

Production of methanol and other green chemicals, CO₂ conversion into value-added products

TRAINING

Academic, collegial and industrial



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Pollet, Bruno	Université du Québec à Trois-Rivières	Canada Research Chair in Green Hydrogen Production	NSERC	Tier 1	New

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>\$0.5m



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3 years, >\$0.5m



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Water electrolysis: from textbook knowledge to the latest scientific strategies and industrial developments†

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Replacing fossil fuels with energy sources and carriers that are sustainable, environmentally benign, and affordable is amongst the most pressing challenges for future socio-economic development. To that goal, hydrogen is presumed to be the most promising energy carrier. Electrocatalytic water splitting, if driven by green electricity, would provide hydrogen with minimal CO₂ footprint. The viability of water electrolysis still hinges on the availability of durable earth-abundant electrocatalyst materials and the

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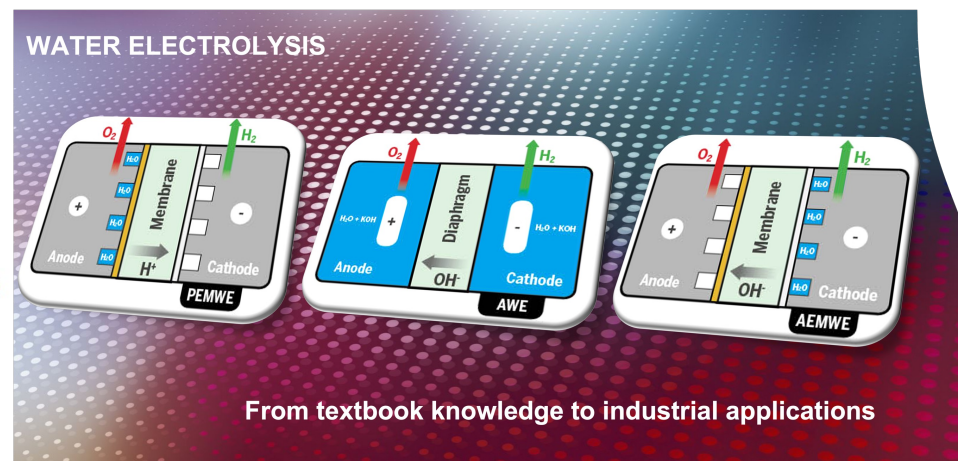
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From textbook knowledge to industrial applications

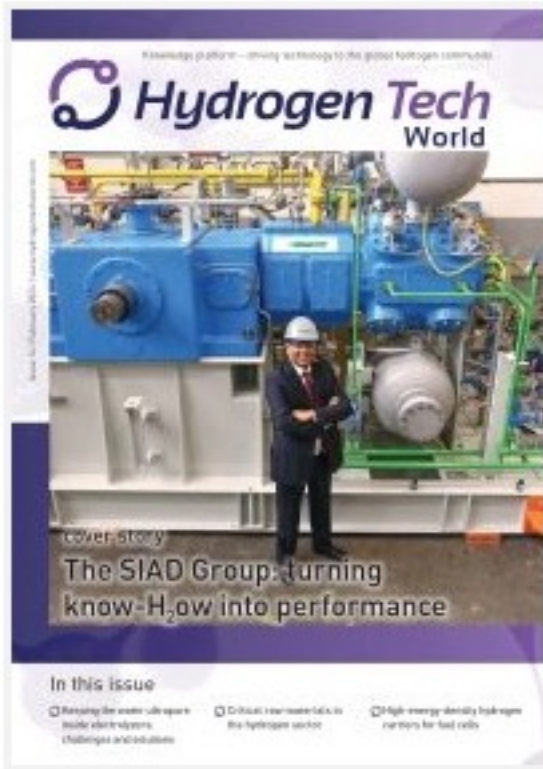
[materials]

Critical raw materials in the hydrogen sector

Although the implementation of global renewable electricity generation capacity is increasing exponentially, with the goal of tripling it by 2030 as established by COP28, the world's renewable hydrogen production capacity is lagging behind. The International Energy Agency (IEA) has recently lowered its five-year forecast for renewable power capacity dedicated to renewable hydrogen production (2023–2028) to 45 GW. It goes without saying that the hydrogen sector will require a substantial amount of critical raw materials (CRMs), for instance, for fuel cells, electrolyzers, hydrogen separation, hydrogen storage, and hydrogen transport.

By Bruno G. Pollet, Director of the Hydrogen Research Institute at the Université du Québec à Trois-Rivières

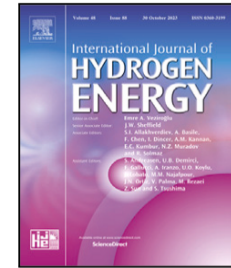
*The equation is simple:
no CRM = no renewables and
no hydrogen revolution!*





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Review Article

Critical and strategic raw materials for electrolyzers, fuel cells, metal hydrides and hydrogen separation technologies

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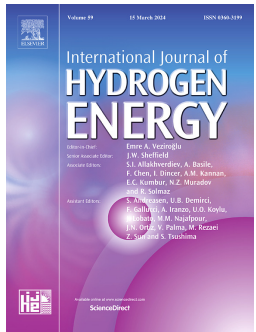
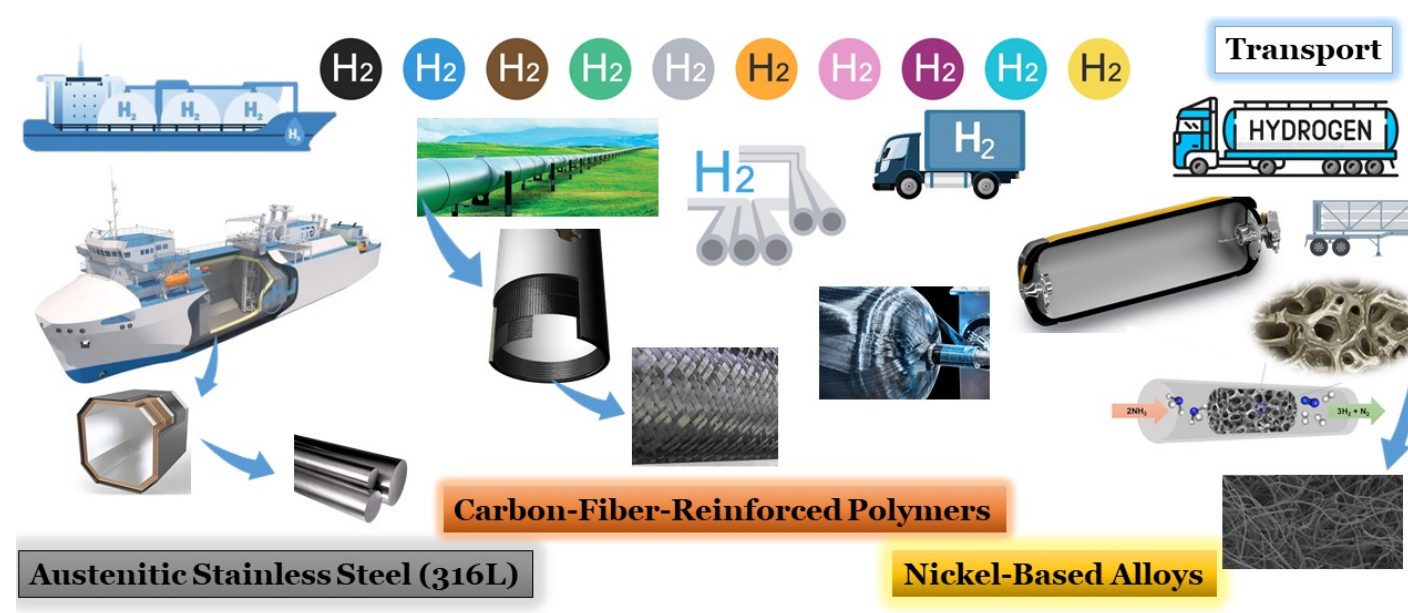
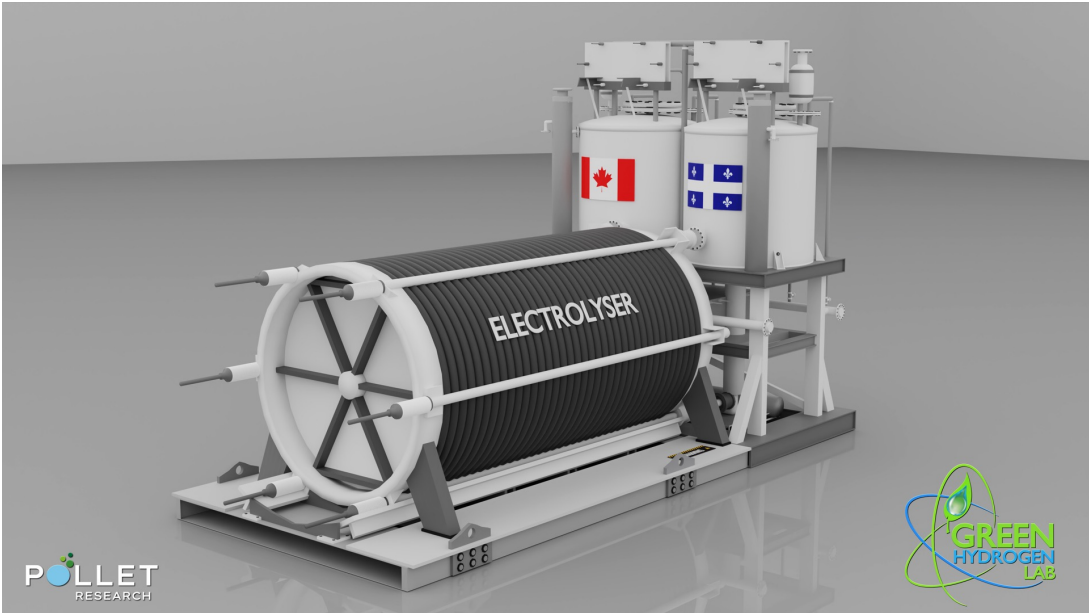
Green hydrogen
Critical raw materials
Strategic raw materials
Electrolyzer technologies
Fuel cell technologies
Sustainable energy

ABSTRACT

This paper provides an in-depth examination of critical and strategic raw materials (CRMs) and their crucial role in the development of electrolyzer and fuel cell technologies within the hydrogen economy. It methodically analyses a range of electrolyzer technologies, including alkaline, proton-exchange membrane, solid-oxide, anion-exchange membrane, and proton-conducting ceramic systems.

Each technology is examined for its specific CRM dependencies, operational characteristics, and the challenges associated with CRM availability and sustainability. The study further extends to hydrogen storage and separation technologies, focusing on the materials employed in high-pressure cylinders, metal hydrides, and hydrogen separation processes, and their CRM implications.

A key aspect of this paper is its exploration of the supply and demand dynamics of CRMs, offering a comprehensive view that encompasses both the present state and future projections. The aim is to uncover potential supply risks, understand strategies, and identify potential bottlenecks for materials involved in electrolyzer and fuel cell technologies, addressing both current needs and future demands as well as supply. This approach is essential for the strategic planning and sustainable development of the hydrogen sector, emphasizing the importance of CRMs in achieving expanded electrolyzer capacity leading up to 2050.



Main Barriers

- Production, transportation, and distribution costs as well as infrastructure development;
- Policy and regulatory framework development and harmonization between regions;
- Lack of market structure and off-takers (demand uncertainty);
- Lack of financial support in the early stage of deployment;
- Access to natural resources;
- Environmental and safety issues.

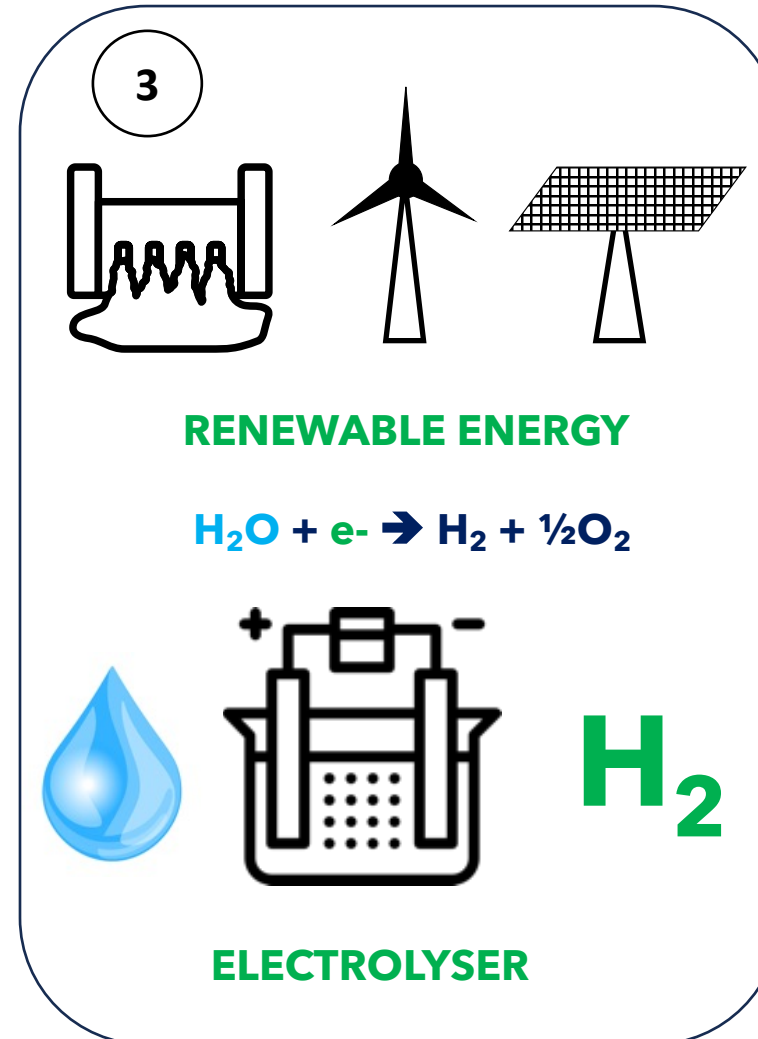
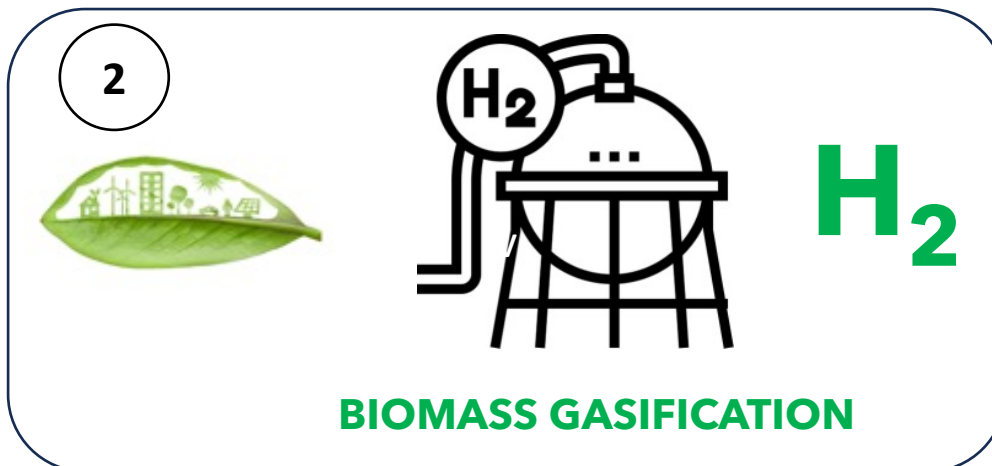
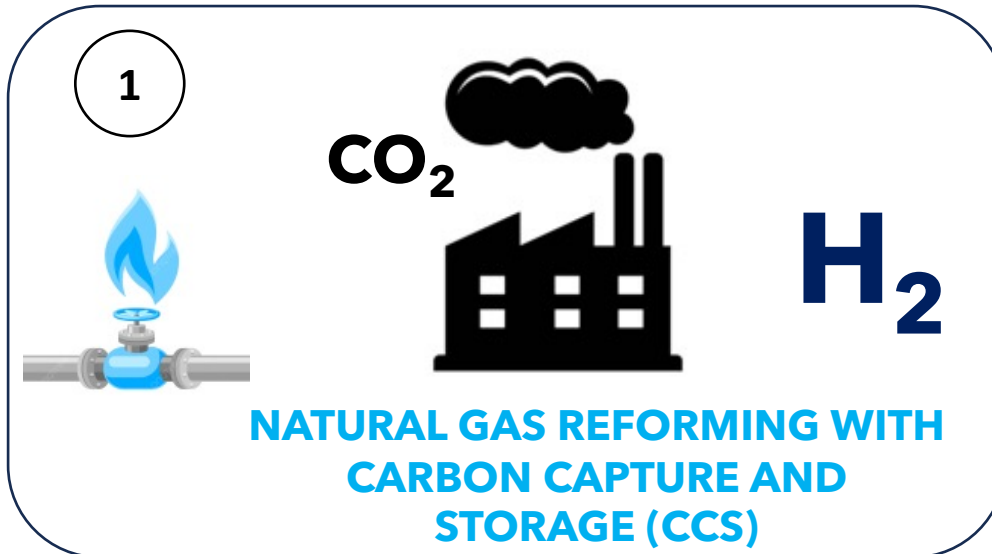
Hydrogen has no colour...This is a fact!

	Colour	Primary Energy / Source of Electricity	Technology	Technology Readiness Level (TRL)	Efficiency	Carbon Footprint	Terminology
Production - Fossil Fuels-	Blue Hydrogen	Natural Gas, Coal + Carbon Capture Sequestration (CCS)	Steam Reforming / Gasification	5-9	80%	Low < 3 kg CO ₂ -eq / kg H ₂	Low-carbon Hydrogen
	Brown Hydrogen	Lignite	Gasification	Mature	<60%	Very High > 20 kg CO ₂ -eq / kg H ₂	High-carbon Hydrogen (Fossil Hydrogen)
	Black Hydrogen	Bituminous Coal		Mature	<60%	Very High > 20 kg CO ₂ -eq / kg H ₂	High-carbon Hydrogen (Fossil Hydrogen)
	Grey Hydrogen	Natural Gas	Steam Reforming	Mature	<85%	Medium to High <15 kg CO ₂ -eq / kg H ₂	High-carbon Hydrogen (Fossil Hydrogen)
			Autothermal Reforming	Mature	<95%	Medium to High <15 kg CO ₂ -eq / kg H ₂	High-carbon Hydrogen (Fossil Hydrogen)
			Partial Oxidation	6-9	<75%	Medium to High <15 kg CO ₂ -eq / kg H ₂	High-carbon Hydrogen (Fossil Hydrogen)
	Turquoise Hydrogen	Natural Gas Biomethane Refuse Derived Fuels	Pyrolysis	6-8	<50%	Low < 3 kg CO ₂ -eq / kg H ₂ + Carbon Black (CB)	Low-carbon Hydrogen
Production - Biomass-	Green Hydrogen	Biomass	Thermolysis	3	<50%	Low < 3 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
		Biomethane	Steam Reforming	9	<85%	Low < 3 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
		Renewable Energies (Solar, Wind, Hydro etc)	Water Electrolysis	6-9	<50%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
Production - Electricity-	Pink Hydrogen	Nuclear		8	<70%	Minimal < 1-2 kg CO ₂ -eq / kg H ₂	Low-carbon Hydrogen
	Yellow Hydrogen	Electrical Network		Mature	<50%	Depending on source for producing electricity	Depending on source for producing electricity

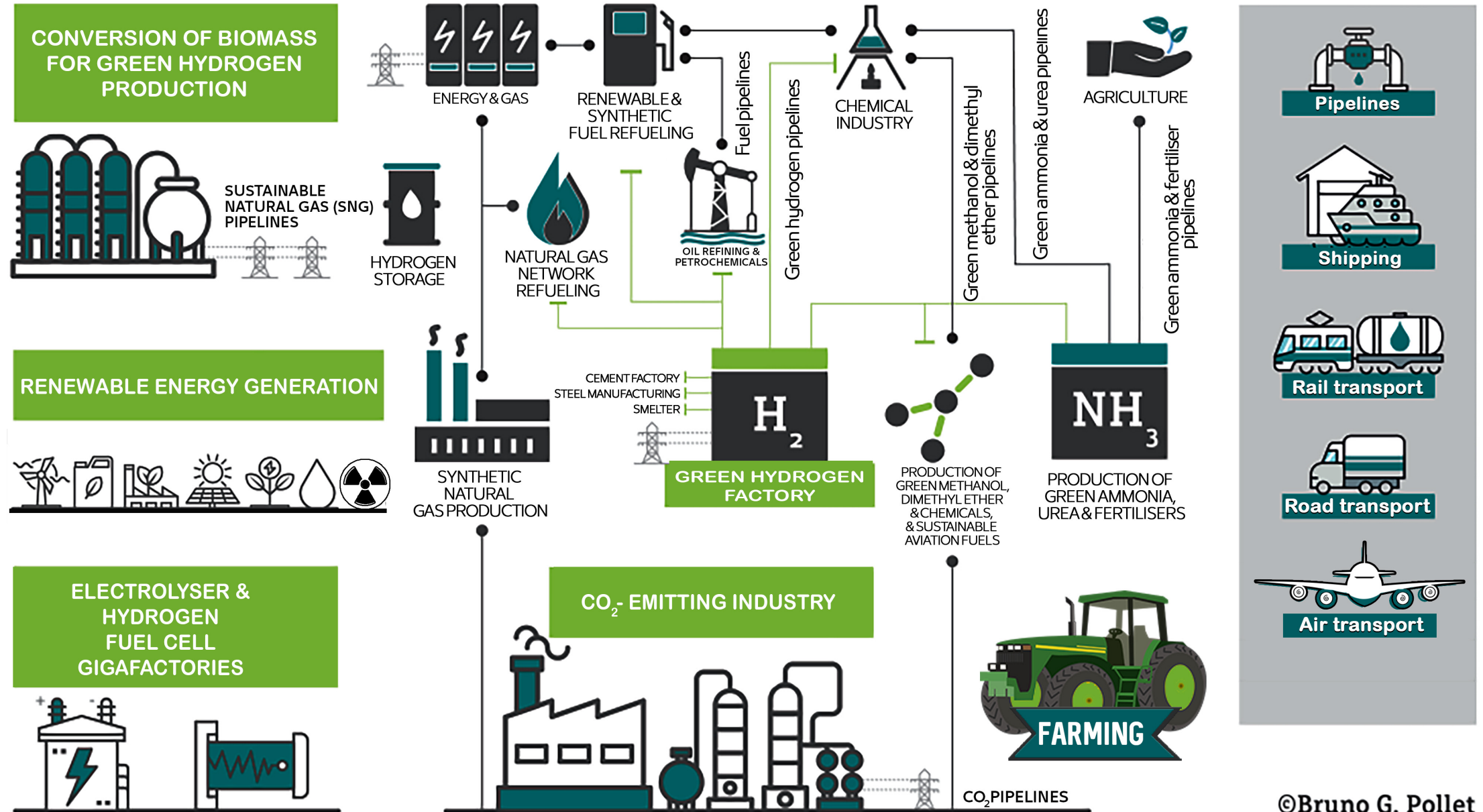
Hydrogen has no colour...This is a fact!

Production -Others-	Unclassified	Water	Photoelectrolysis	3	15%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
			Photochemical	3	15%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
			Thermochemical	3-5	<50%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
		Biomass	Bioelectrolysis	3	-	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
			Biophotolysis	4	-	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
			Dark Fermentation	8	50-70%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
			Photo Fermentation	8	30-50%	Minimal 0 kg CO ₂ -eq / kg H ₂	Renewable Hydrogen
		Naturally Occurring	White Hydrogen				

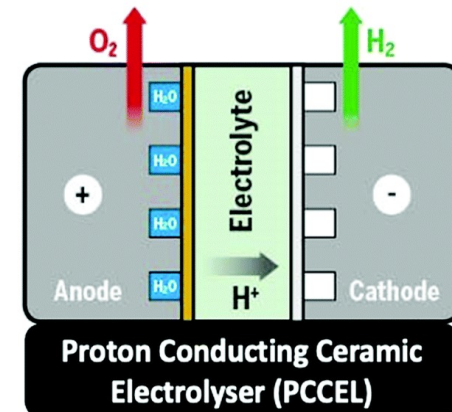
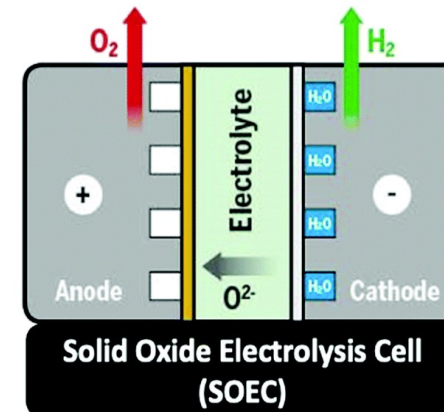
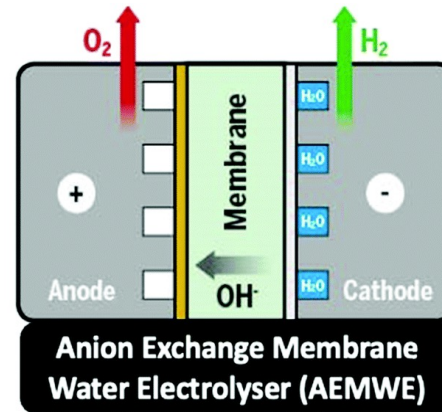
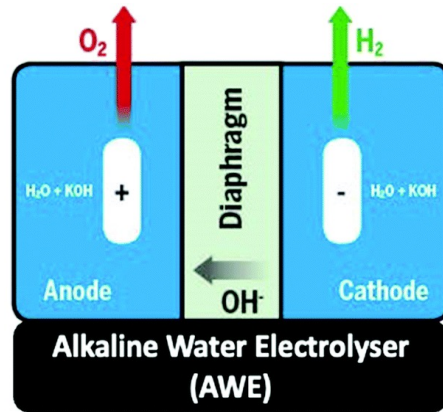
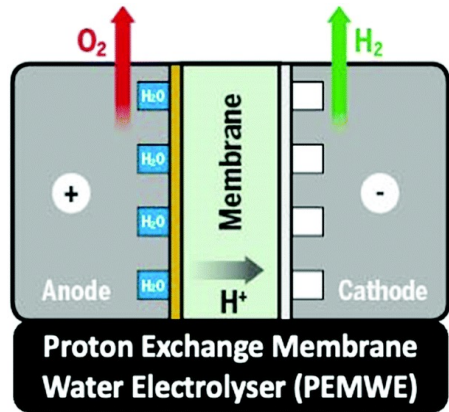
Main LCH₂/RH₂ Production



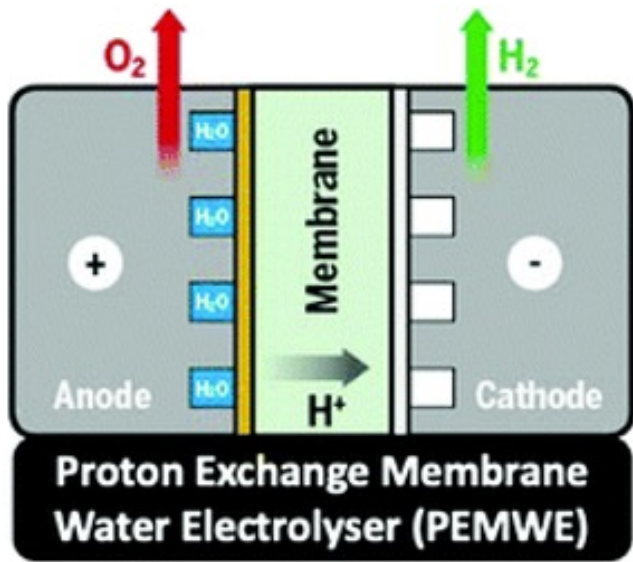
LCH2 and RH2 VALUE CHAIN



WATER ELECTROLYSERS



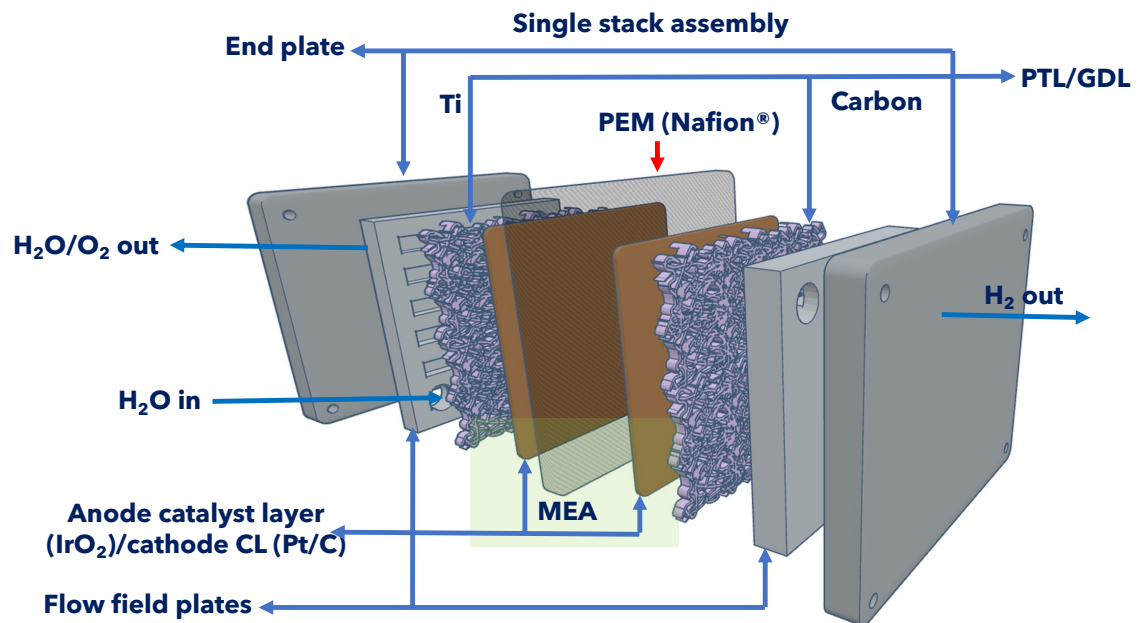
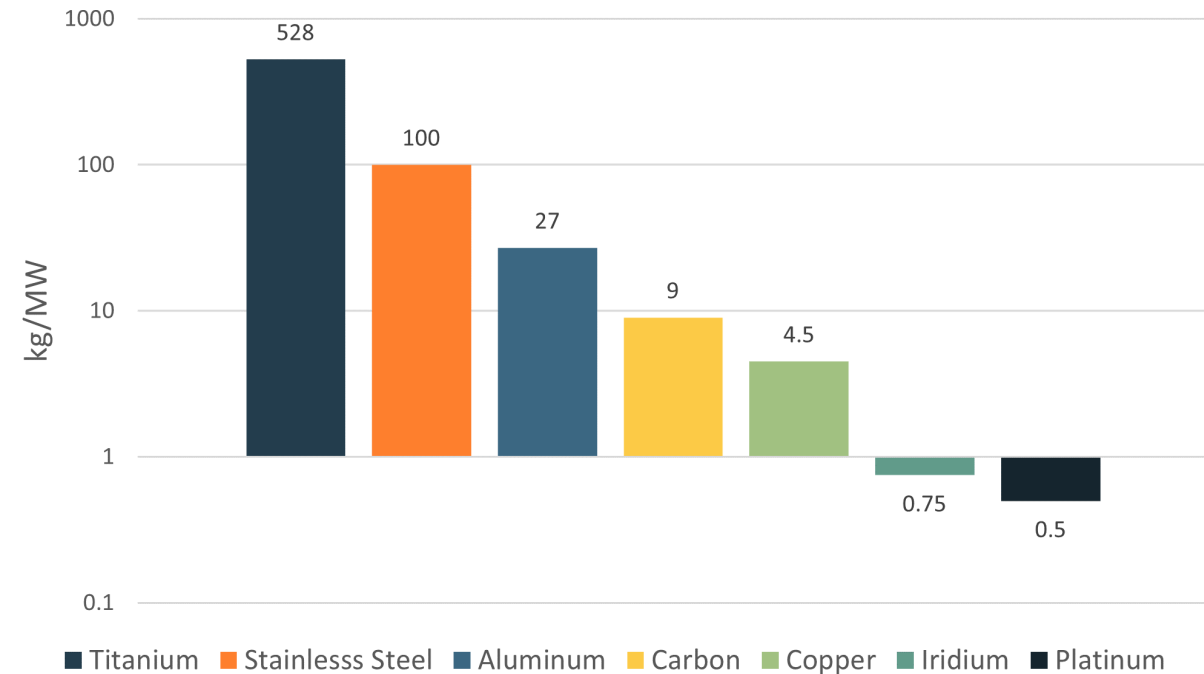
Operating temperature	50–80 °C	70–90 °C	40–60 °C	700–850 °C	300–600 °C
Operating pressure	< 70 bar	1–30 bar	< 35 bar	1 bar	1 bar
Electrolyte	PFSA membranes	Potassium hydroxide (KOH) 5–7 mol L ⁻¹	DVB polymer support with KOH or NaHCO ₃ 1 mol L ⁻¹	Ytria-stabilised zirconia (YSZ)	(Y,Yb)-Doped-Ba(Ce,Zr)O _{3-δ}
Separator	Solid electrolyte (above)	ZrO ₂ stabilised with PPS mesh	Solid electrolyte (above)	Solid electrolyte (above)	Solid electrolyte (above)
Electrode/catalyst (oxygen side)	Iridium oxide	Nickel coated perforated stainless steel	High surface area nickel or NiFeCo alloys	Perovskite-type (e.g., LSCF, LSM)	Perovskite-type (e.g., LSCF, LSM)
Electrode/catalyst (hydrogen side)	Platinum nanoparticles on carbon black	Nickel coated perforated stainless steel	High surface area nickel	Ni/YSZ	Ni/YSZ, Ni-BZY/LSC, BCFYZ
Porous transport layer anode	Platinum coated sintered porous titanium	Nickel mesh (not always present)	Nickel foam	Coarse nickel-mesh or foam	Coarse nickel-mesh or foam
Porous transport layer cathode	Sintered porous titanium or carbon cloth	Nickel mesh	Nickel foam or carbon cloth	None	None
Bipolar plate anode	Platinum-coated titanium	Nickel-coated stainless steel	Nickel-coated stainless steel	None	None
Bipolar plate cathode	Gold-coated titanium	Nickel-coated stainless steel	Nickel-coated stainless steel	Cobalt-coated stainless steel	Cobalt-coated stainless steel
Frames and sealing	PTFE, PSU, ETFE	PSU, PTFE, EPDM	PTFE, silicon	Ceramic glass	Ceramic glass

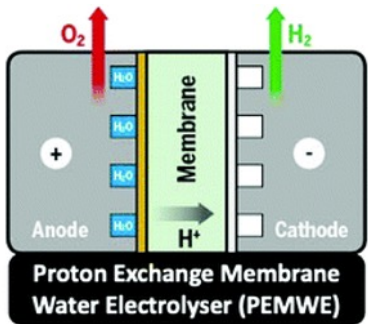


Material selection for PEMWE

Bipolar plates							Anode (OER)				Cathode (HER)					
Main material		Coating					Electrocatalyst		Current collector		Electrocatalyst		Current collector			
Ti	Ni	SS	C	Cr	Ag	Pt	Ru	Ir	Ti	Au	SS	Pt	Pt	Pd	Ti	C
Al			Ni													

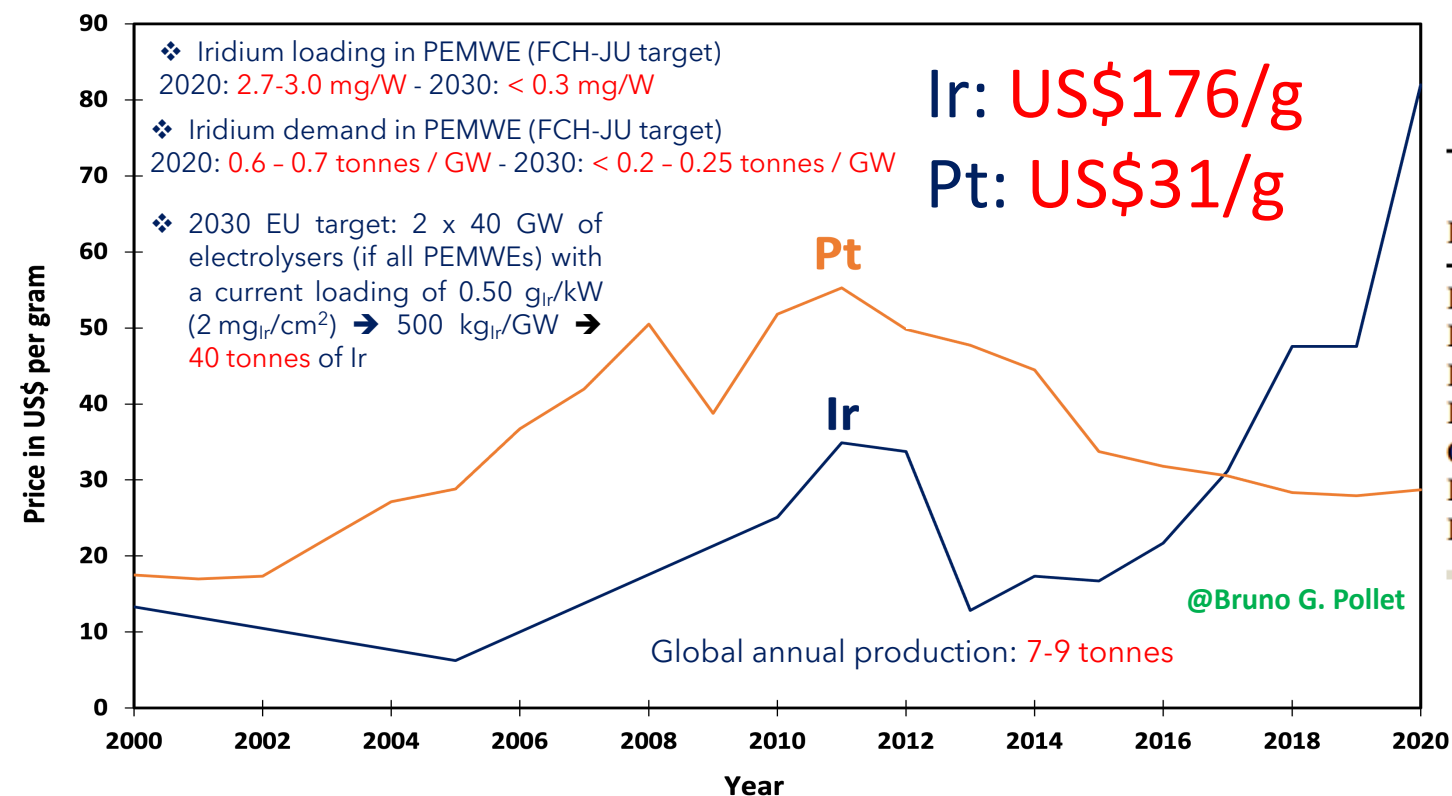
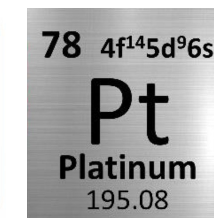
Material demand for PEM electrolyzer



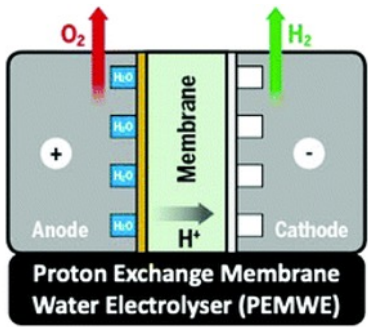


Critical and Strategic Minerals (CSM)

PGM - Platinum Group Metals



Parameter	2020 status	2020 target	2035 target	Future
Ir (mg cm ⁻²)	2-5	1	0.2-0.40	0.05-0.2
Ir (g kW ⁻¹)	< 2.5 (0.33/0.5/0.67)	0.40	0.05-0.4	0.01-0.4
Pt (mg cm ⁻²)	1-2	1	0.5	0.05
Pt (g kW ⁻¹)	0.5-1	0.5	0.25	0.1
Current density (A cm ⁻²)	2	2	3	5
Power density (W cm ⁻²)	3	3	8	10
Electrode area (m ²)	0.12	—	—	0.50

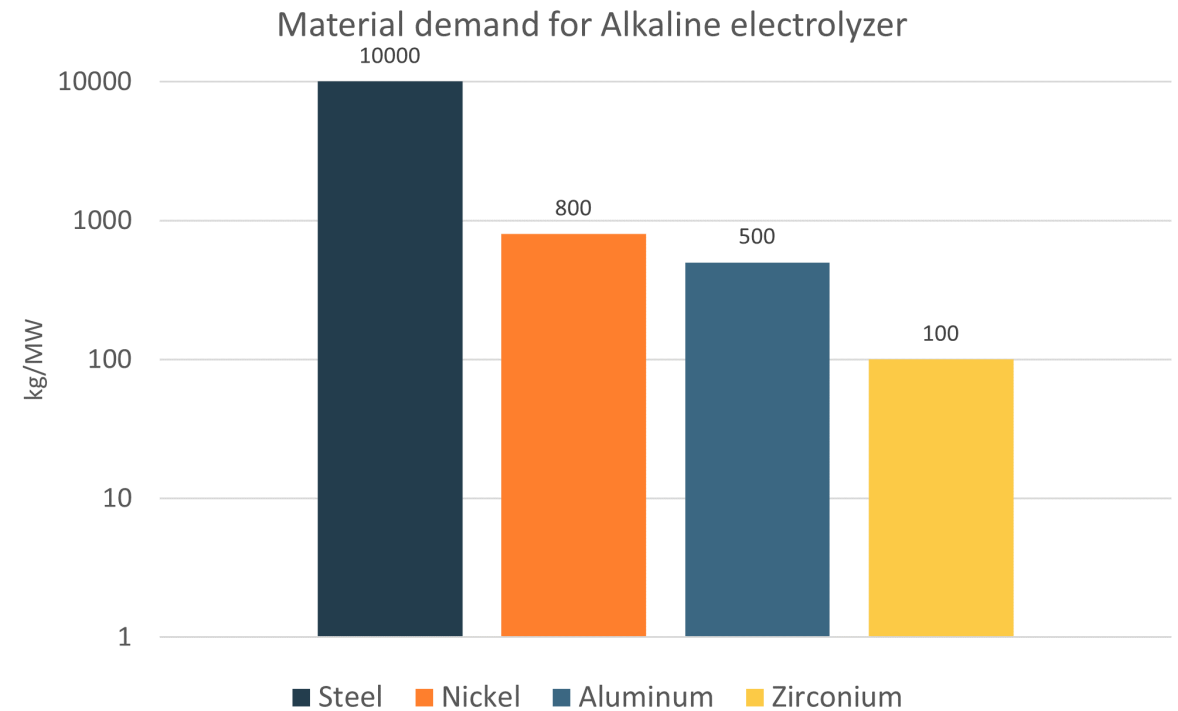
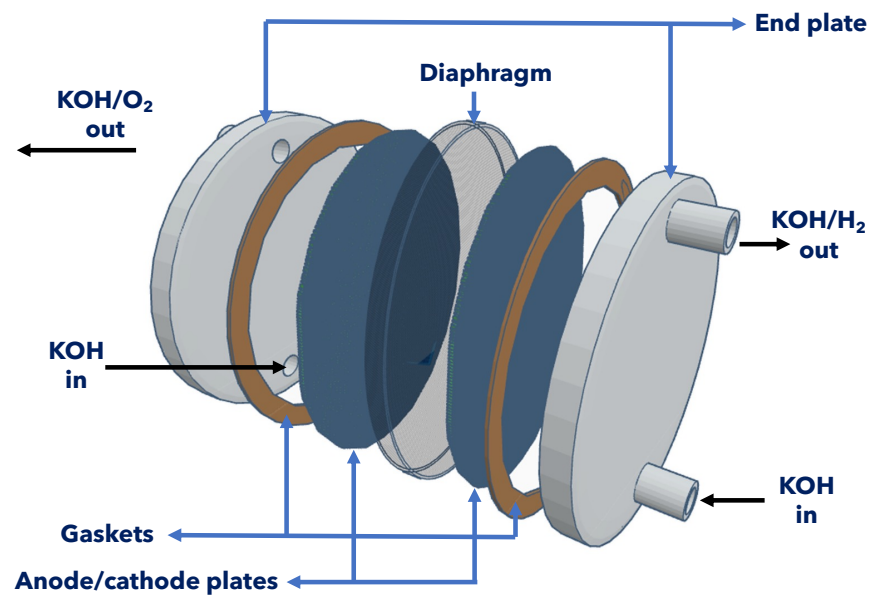
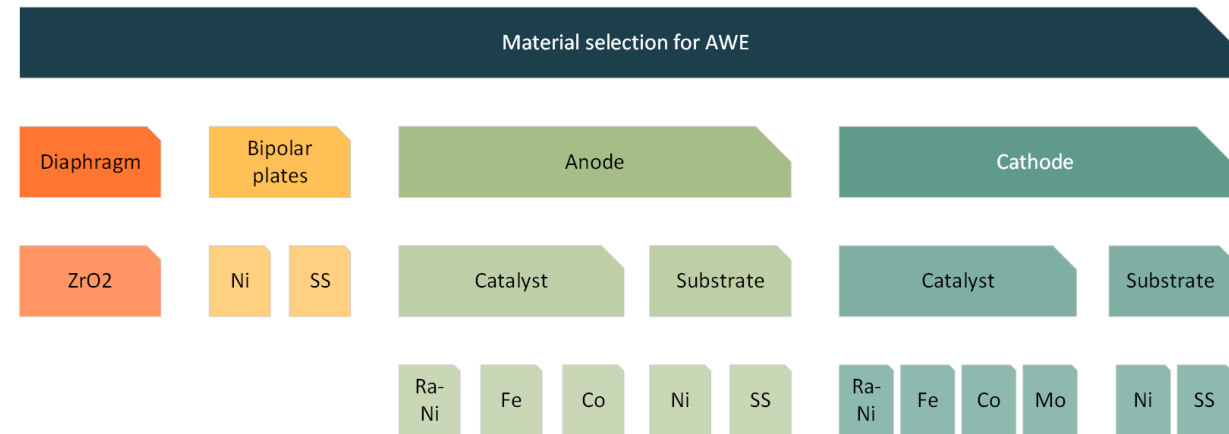
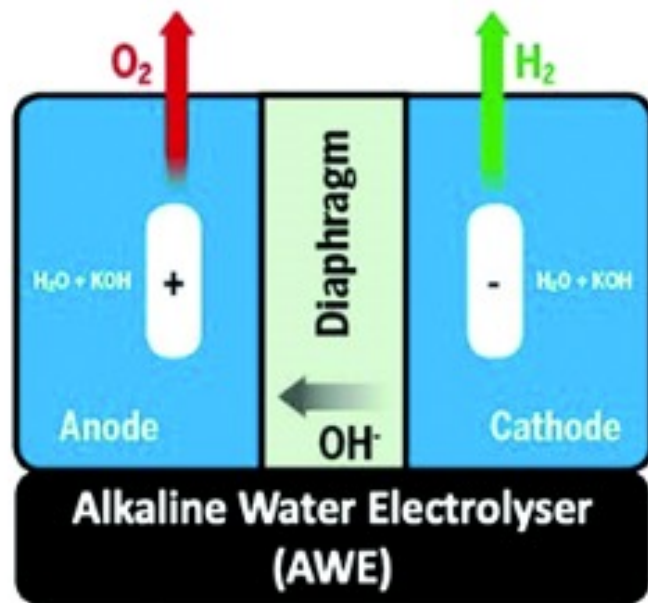


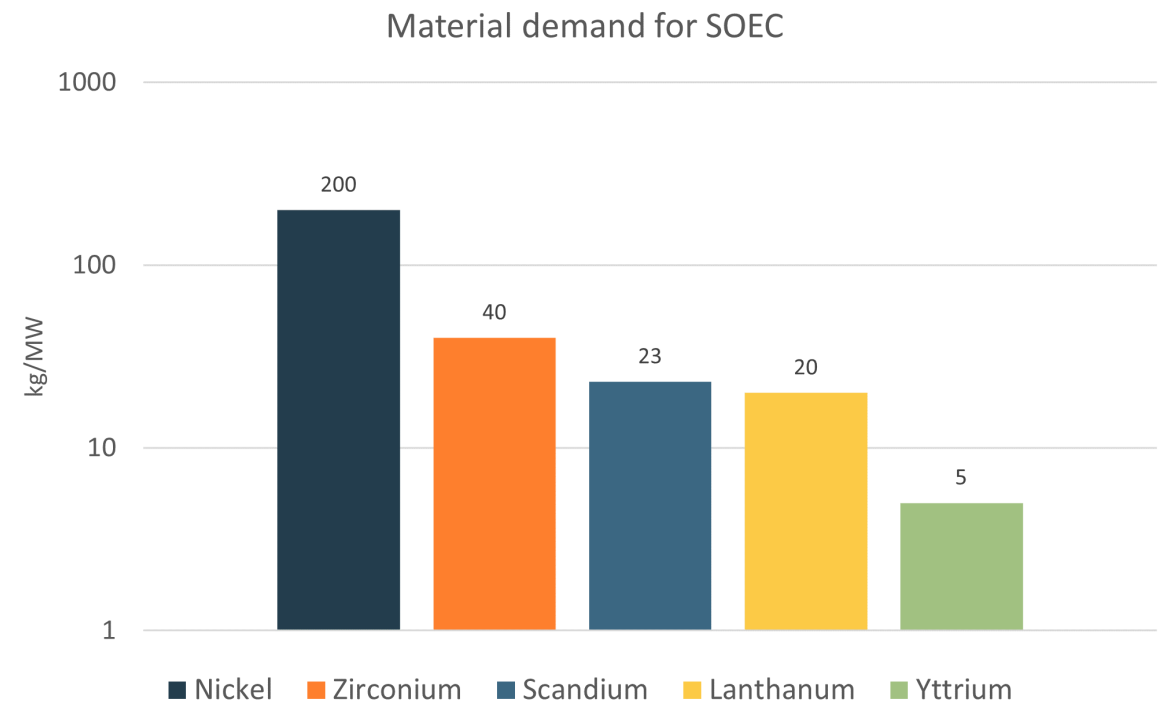
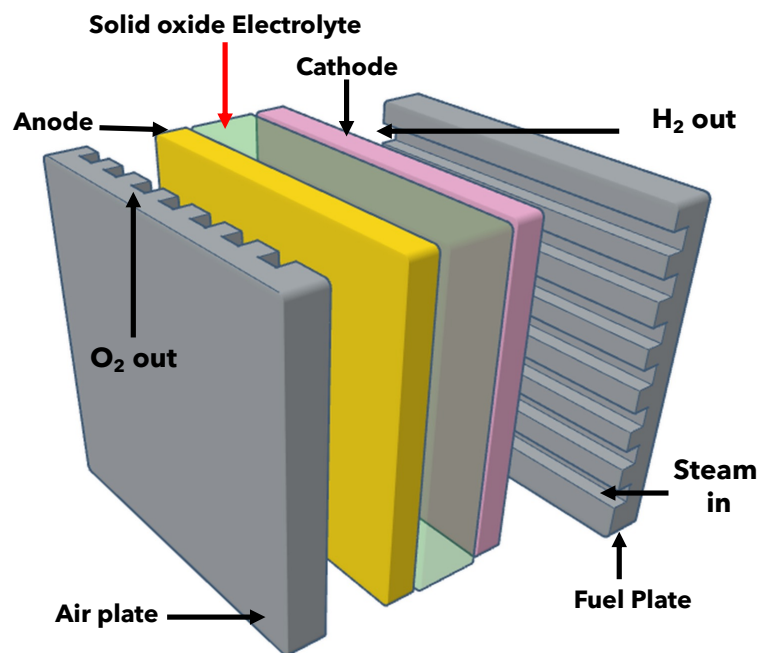
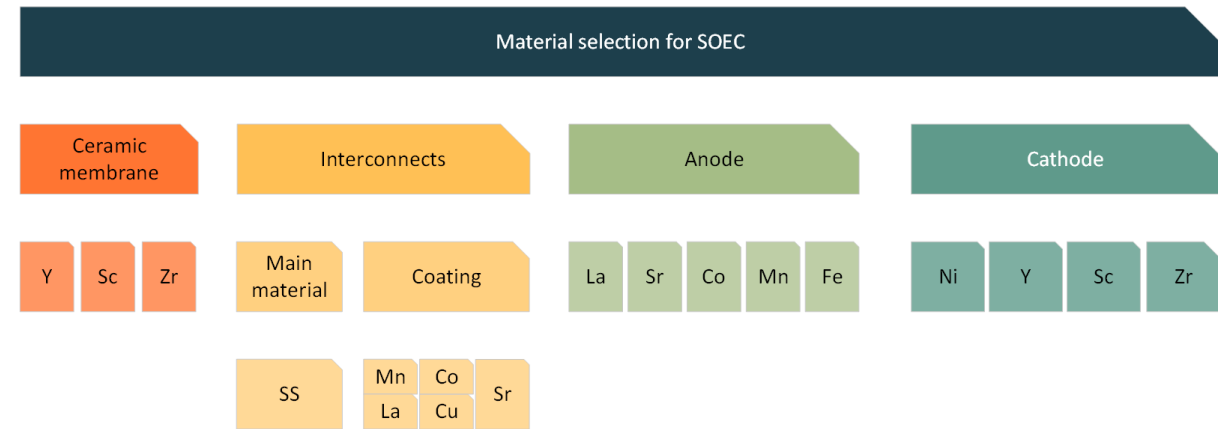
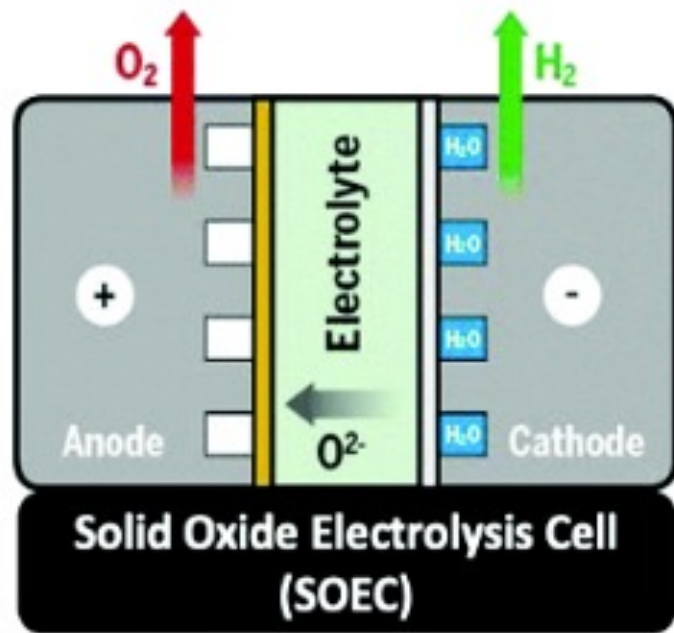
Iridium (Ir) in PEMWE

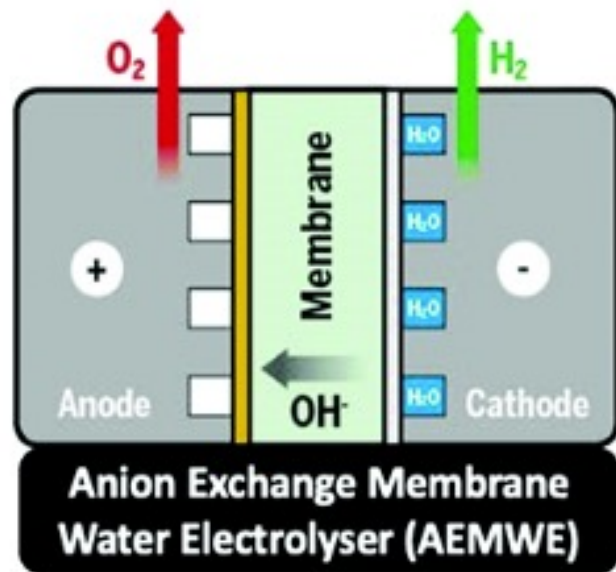


- 0.2 - 0.5 kg of Ir per MW.
- 200 - 500 kg of Ir per GW.
- **US\$100 000** of Ir in 1 MW.
- **US\$100 000 000** of Ir per 1 GW.
- To produce **6 000 000 tonnes of hydrogen** require **40 GW of PEMWE** and **20 tonnes of Ir!**









Material selection for AEMWE

Bipolar plates

Anode (OER)

Cathode (HER)

Ni SS

Catalyst

Current collector

Catalyst

Current collector

Fe

Co

Ni

Pb

Cu

Ru

SS

Ni

Fe

Co

Ni

Mo

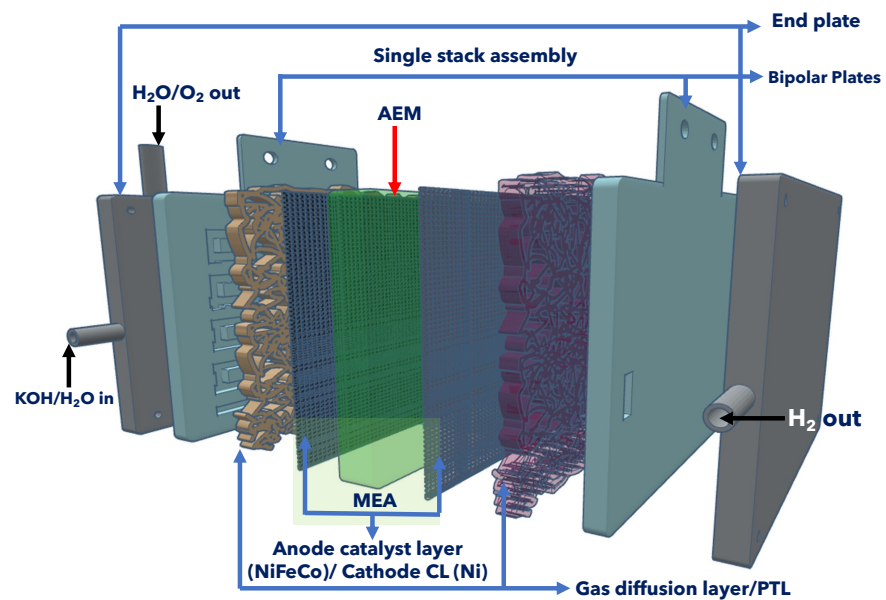
Cu

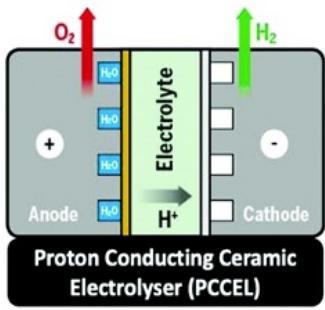
Ce

La

C

Ni





Material selection for PCCEL

Ceramic membrane

Interconnects

Anode

Cathode

Ba

Sr

Ca

Yb

SS

Ba

Gd

La

Co

Fe

Ni

Ceramic membrane material

Ce

Zr

Y

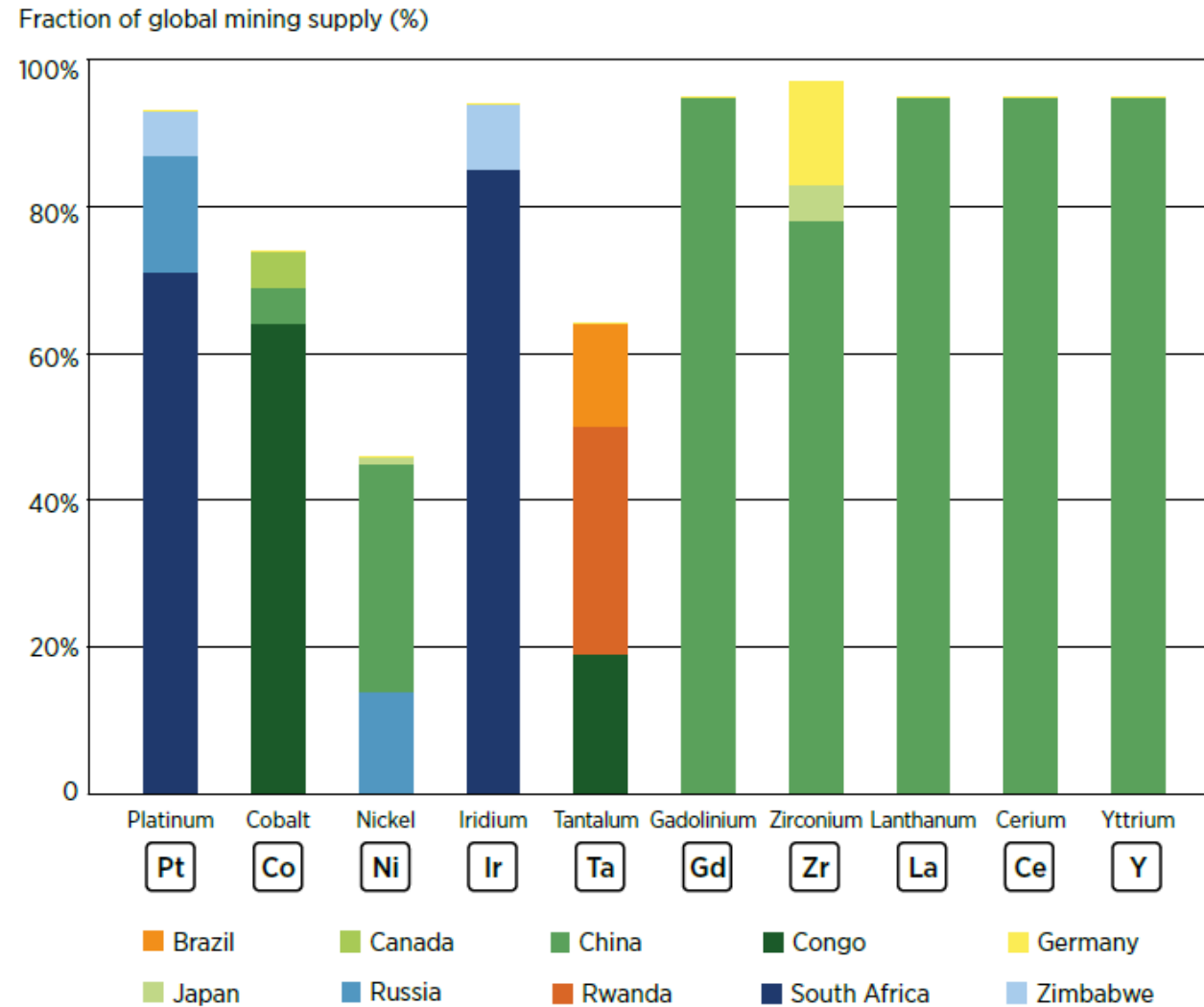
Zr

Y

Sr

Ce

Top Producers of Critical Materials in Electrolysers



Extract from: **IRENA (2022), Geopolitics of the Energy Transformation: The Hydrogen Factor**, International Renewable Energy Agency, Abu Dhabi.

Hydrogen (MH) storage materials

Ni

Co

Al

Mn

Zr

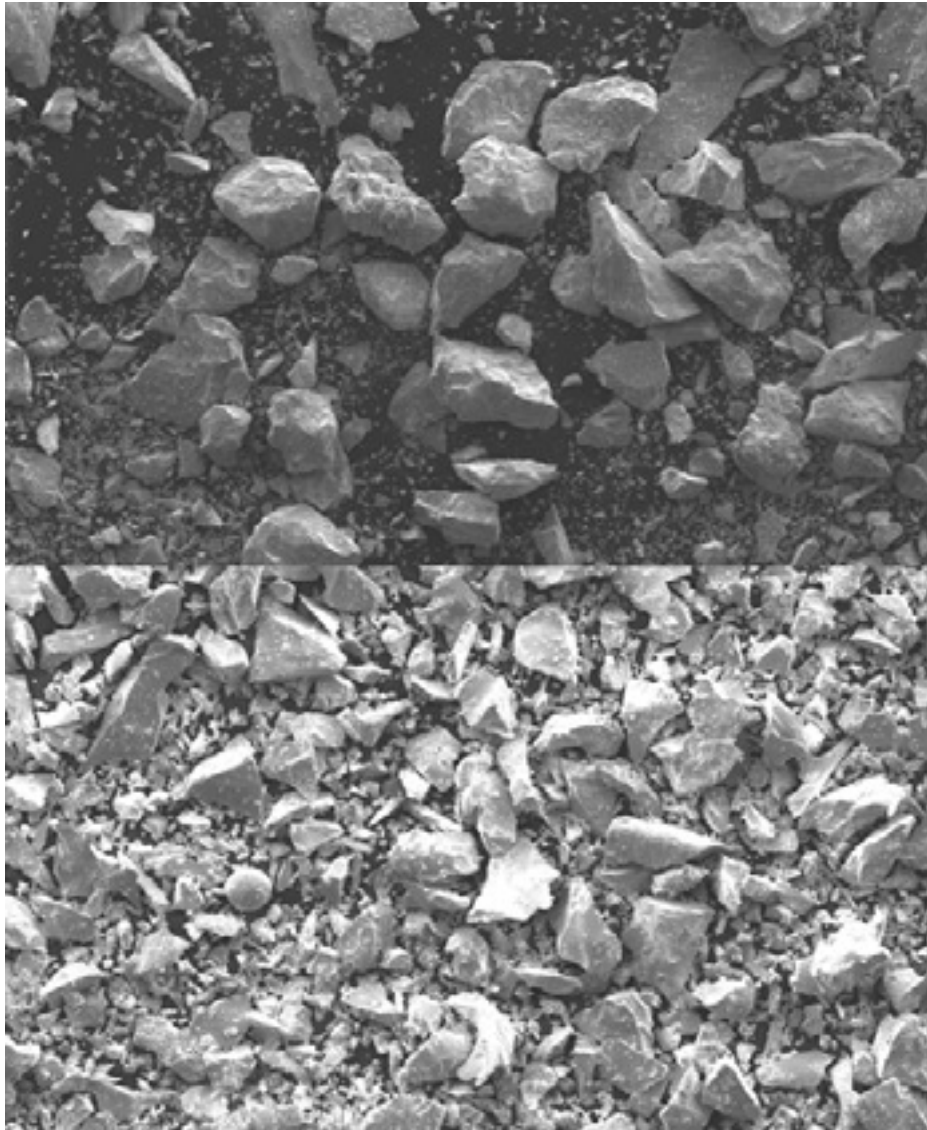
Cr

Cu

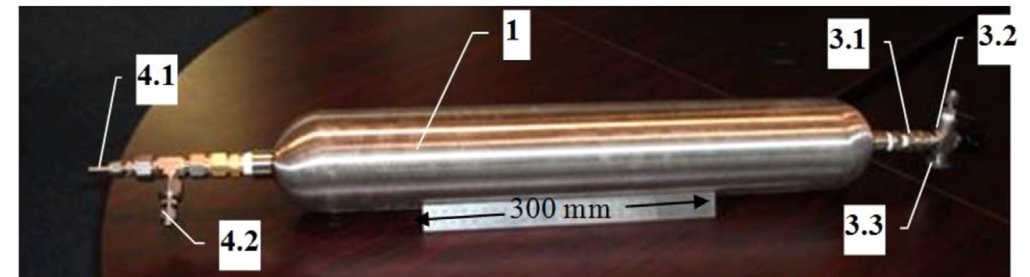
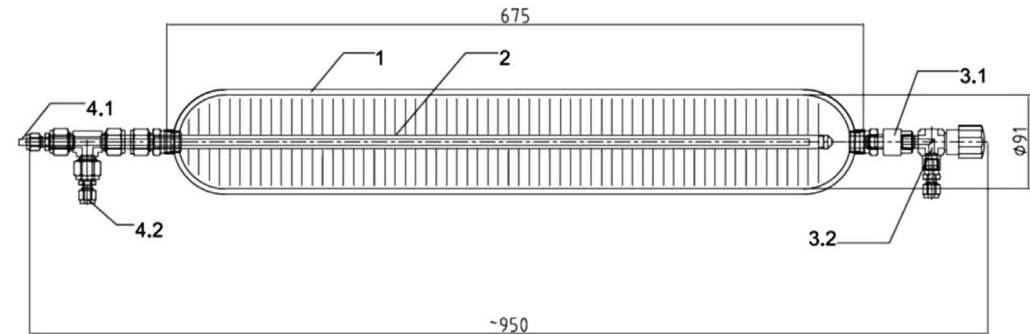
Ti

La

V



METAL
HYDRIDE
(MH)



Assembly line for hydrogen storage materials

(A fully functional production line to produce metal hydride materials)



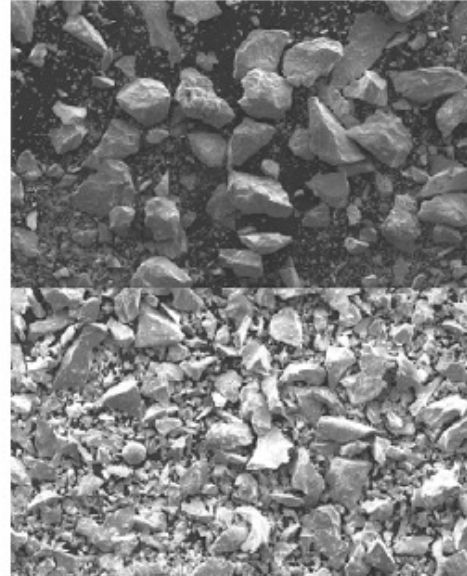
▶ Metal Hydride Materials

In March 2014 HySA Systems Competence Centre plans to launch a production facility for the manufacturing of Metal Hydride (MH) materials for hydrogen storage and thermally-driven compression, as well as for NiMH batteries

The facility based on locally developed induction melting and annealing furnaces will be able to daily produce up to 25 kg of the MH materials to be used for HySA Systems MH hydrogen storage / supply units and hydrogen compressors, as well as to be exported to various customers.

The facility will manufacture the MH materials from the abundant South African feed-stock, according to new technology recently developed at HySA Systems (Patents ZA2012/03824, ZA2012/08851).

Copyright HySA Systems
(University of the Western
Cape, UWC)

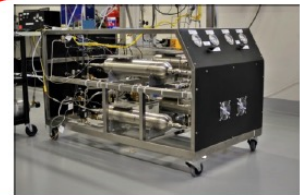
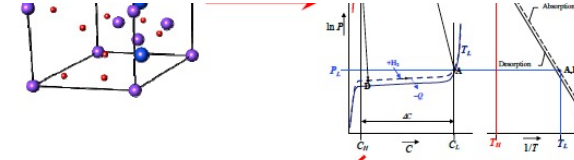


▶ Metal Hydride Hydrogen Compressors

MH materials: AB_5 , A_2B_7 and AB_2 -type alloys

Customized compositions according to customers' specifications, including target Pressure/Concentration/Temperature performances for Hydrogen absorption / desorption

Load capacity (melting & annealing)
25 kg



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Private Bag X17, South Africa

Professor Bruno G. Pollet FRSC AFChEME
Director of HySA Systems Competence Centre
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Cell: +27(0)714840323
Email: bgpollet@hysasystems.org
Web: www.hysasystems.org

▶ Metal Hydride Hydrogen Storage and Supply Containers



Metal Hydride Materials



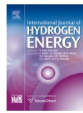
INTERNATIONAL JOURNAL OF HYDROGEN ENERGY 39 (2014) 3577–3596



Review

**Hydrogen South Africa (HySA) Systems
Competence Centre: Mission, objectives,
technological achievements and breakthroughs**

Bruno G. Pollet*, Sivakumar Pasupathi, Gerhard Swart, Kobus Mouton,
Mykhaylo Lototsky, Mario Williams, Piotr Bujlo, Shan Ji,
Bernard J. Bladergroen, Vladimir Linkov



**Availability of mineral
deposits for the
manufacturing MH
alloys in South Africa**

10,000 ton magnesium-based hydrides manufacturing plant under construction in China

The vehicle contains 12 hydrogen storage containers, each of which is filled with high-capacity magnesium alloy hydrogen storage materials.



In addition, the selective adsorption of hydrogen by magnesium alloy can also be used to purify hydrogen. The released hydrogen can reach the standard of high-purity hydrogen or even ultra-pure hydrogen.

HyFun now has a 1,000 ton production capacity of magnesium alloy in **Jiangsu** province, expanding 10-fold of capacity may signal that the company expects rapid growth of magnesium-based hydrogen storage material application in China.

Main Elements in Electrolysers (and Hydrogen Fuel Cells), Metal Hydrides and Lithium-ion Batteries

@Bruno G. Pollet

PEMWE

Proton Exchange Membrane
Water Electrolyser

AWE

Alkaline Water Electrolyser

AEMWE

Anion Exchange Membrane
Water Electrolyser

SOEC

Solid Oxide Electrolysis Cell

PCCEL

Proton Conducting Ceramic
Electrolyser

MH

Metal Hydride
inc. AB-, AB₂-, AB₅-types & IMC
- InterMetallic Compound

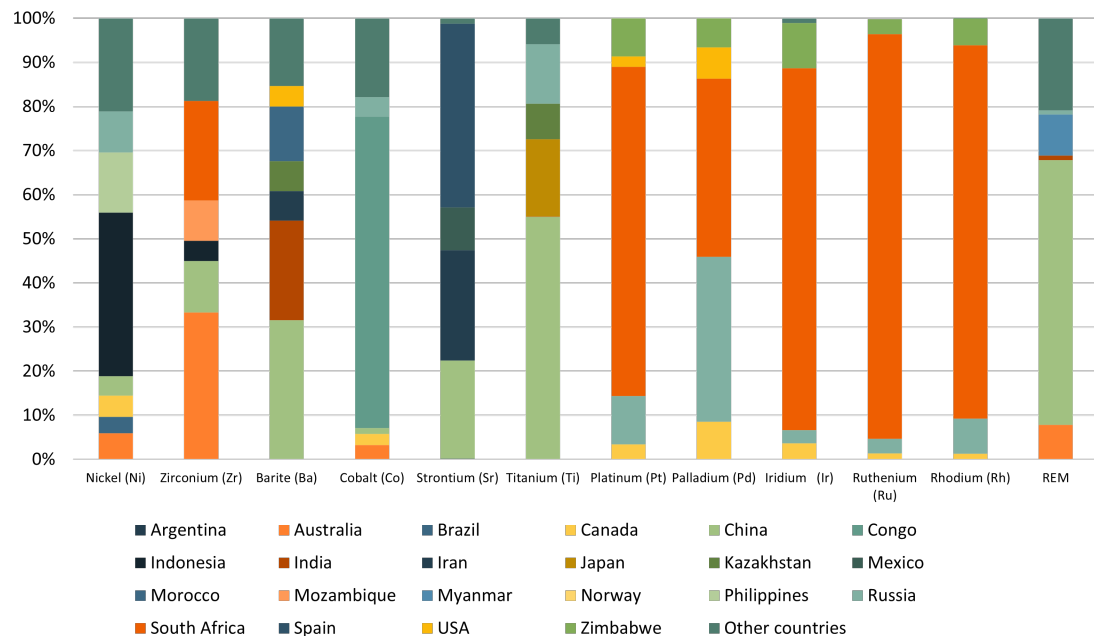
LIB

Lithium-ion Battery
inc. LCO, LMO, NMC & LFP

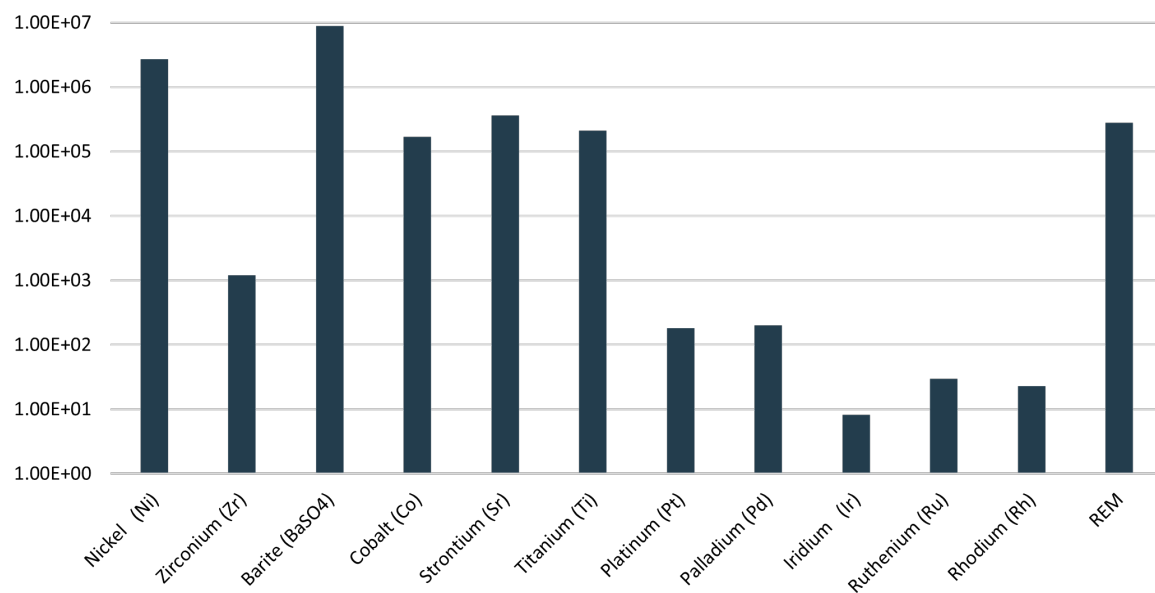
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© Bruno G. Pollet

Annual global critical raw material production



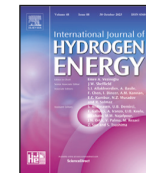
Annual global production in tonnes



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Review Article

Critical and strategic raw materials for electrolyzers, fuel cells, metal hydrides and hydrogen separation technologies

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ARTICLE INFO

Keywords:

Green hydrogen
Critical raw materials
Strategic raw materials
Electrolyzer technologies
Fuel cell technologies
Sustainable energy

ABSTRACT

This paper provides an in-depth examination of critical and strategic raw materials (CRMs) and their crucial role in the development of electrolyzer and fuel cell technologies within the hydrogen economy. It methodically analyses a range of electrolyzer technologies, including alkaline, proton-exchange membrane, solid-oxide, anion-exchange membrane, and proton-conducting ceramic systems.

Each technology is examined for its specific CRM dependencies, operational characteristics, and the challenges associated with CRM availability and sustainability. The study further extends to hydrogen storage and separation technologies, focusing on the materials employed in high-pressure cylinders, metal hydrides, and hydrogen separation processes, and their CRM implications.

A key aspect of this paper is its exploration of the supply and demand dynamics of CRMs, offering a comprehensive view that encompasses both the present state and future projections. The aim is to uncover potential supply risks, understand strategies, and identify potential bottlenecks for materials involved in electrolyzer and fuel cell technologies, addressing both current needs and future demands as well as supply. This approach is essential for the strategic planning and sustainable development of the hydrogen sector, emphasizing the importance of CRMs in achieving expanded electrolyzer capacity leading up to 2050.

CRM Supply Risk

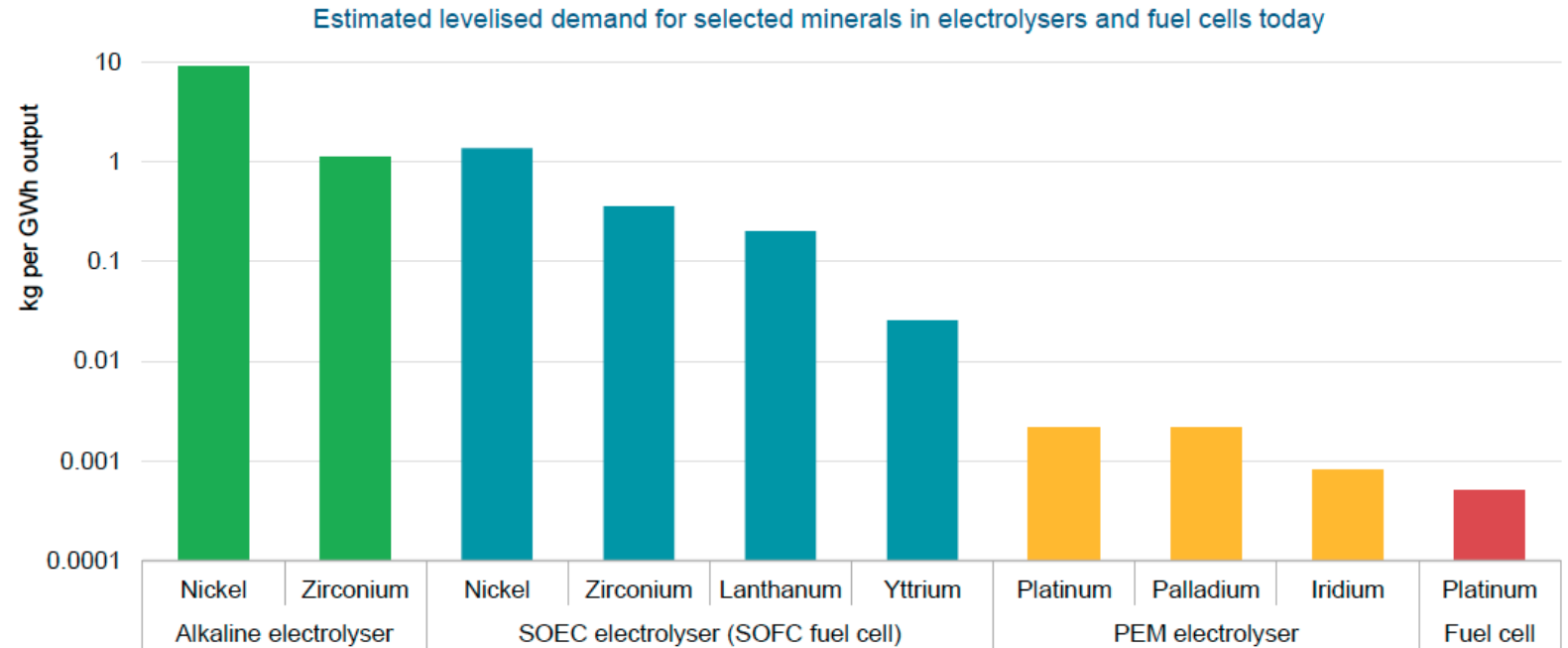
- PEMWE and AWE use PGMs typically as catalysts – Iridium and Platinum which are considered to have **high supply risk**.
- Out of 5 critical materials, only titanium is considered to have **low to medium supply risk**.
- Yttrium and Scandium used in SOEC are considered to have a **high supply risk**.
- Recycling may not play an important role in relaxing the supply chain situation of these CRMs because of overall market growth rate.

The Role of Critical Minerals in Clean Energy Transitions

World Energy Outlook Special Report



Hydrogen electrolyzers and fuel cells could drive up demand for nickel, platinum and other minerals, but the market effects will depend on the shares of the different electrolyser types



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Notes: PEM = proton exchange membrane; SOEC = solid oxide electrolysis cells; SOFC = solid oxide fuel cell. Normalisation by output accounts for varying efficiencies of different electrolysis technologies. Full load hours of electrolyzers assumed to be 5 000 hours per year.

Sources: Bareiß et al.(2019); Fuel Cells and Hydrogen Joint Undertaking (2018); James et al. (2018); Kiemel et al. (2021); Koj et al. (2017); Lundberg (2019); NEDO (2008); Smolinka et al. (2018); US Department of Energy (2014; 2015).

Clean Energy Cycle

EXPLORATION

EXTRACTION/
TRANSFORMATION/
PROCESSING

MATERIALS for FC,
WE, MH & LIB

COMPONENTS for
FC, WE, MH & LIB

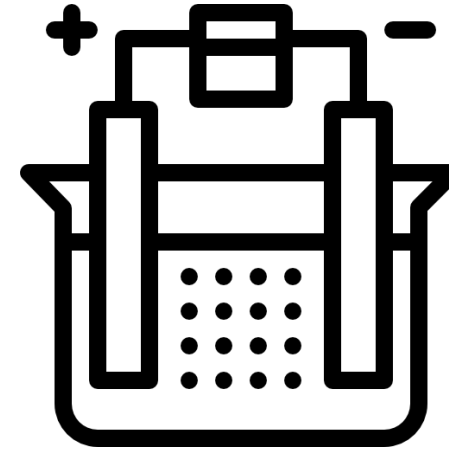
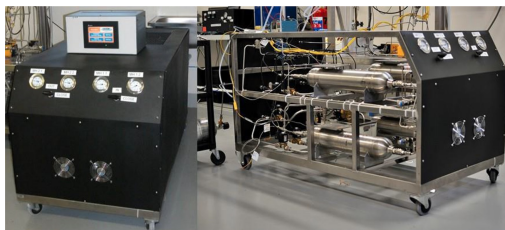
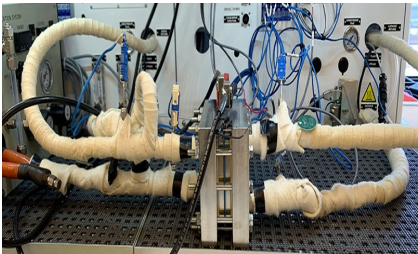
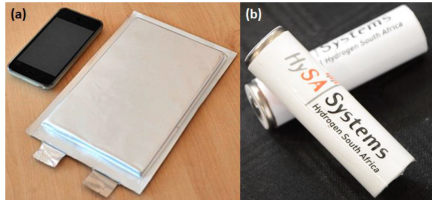
COLLECTION and
RECYCLING

USAGE

MANUFACTURING

PRODUCTION

R&D +
INNOVATION



Conclusions

- Increasing concerns about the future availability of CRMs e.g., Li, Co, Ni and rare earths but also processed materials and components.
- The bottleneck is not caused by **physical scarcity**.
- The bottleneck is caused by **geopolitical aspects** - extraction + processing of CRM are concentrated in a small number of countries - although China + Russia dominate most of the markets.
- Countries (mainly US, EU + Japan) with a large demand for CRMs for their clean energy industry depend on a small group of suppliers.
- This is going to create disputes and possible regional conflicts!

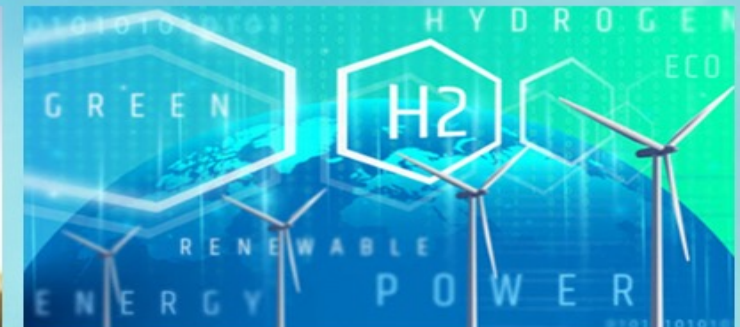
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Université du Québec
à Trois-Rivières



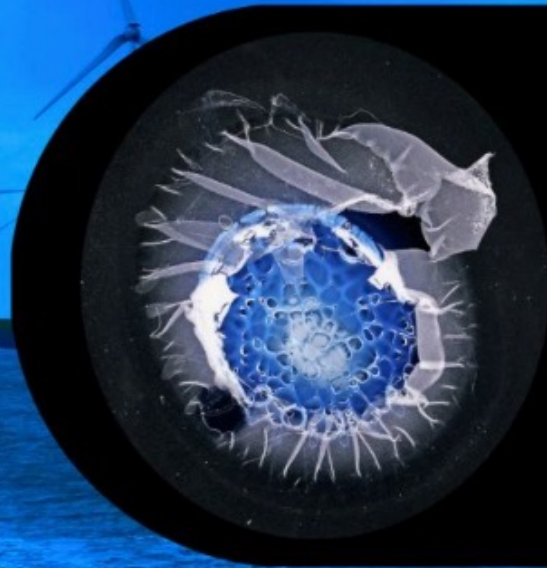
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Division



Prof. Dr. Bruno G. Pollet

President of the Green Hydrogen
Division at International Association...





TECHNOLOGY CONFERENCE

ELECTROLYSIS NORTH AMERICA

4-6 June 2024 Toronto, Canada

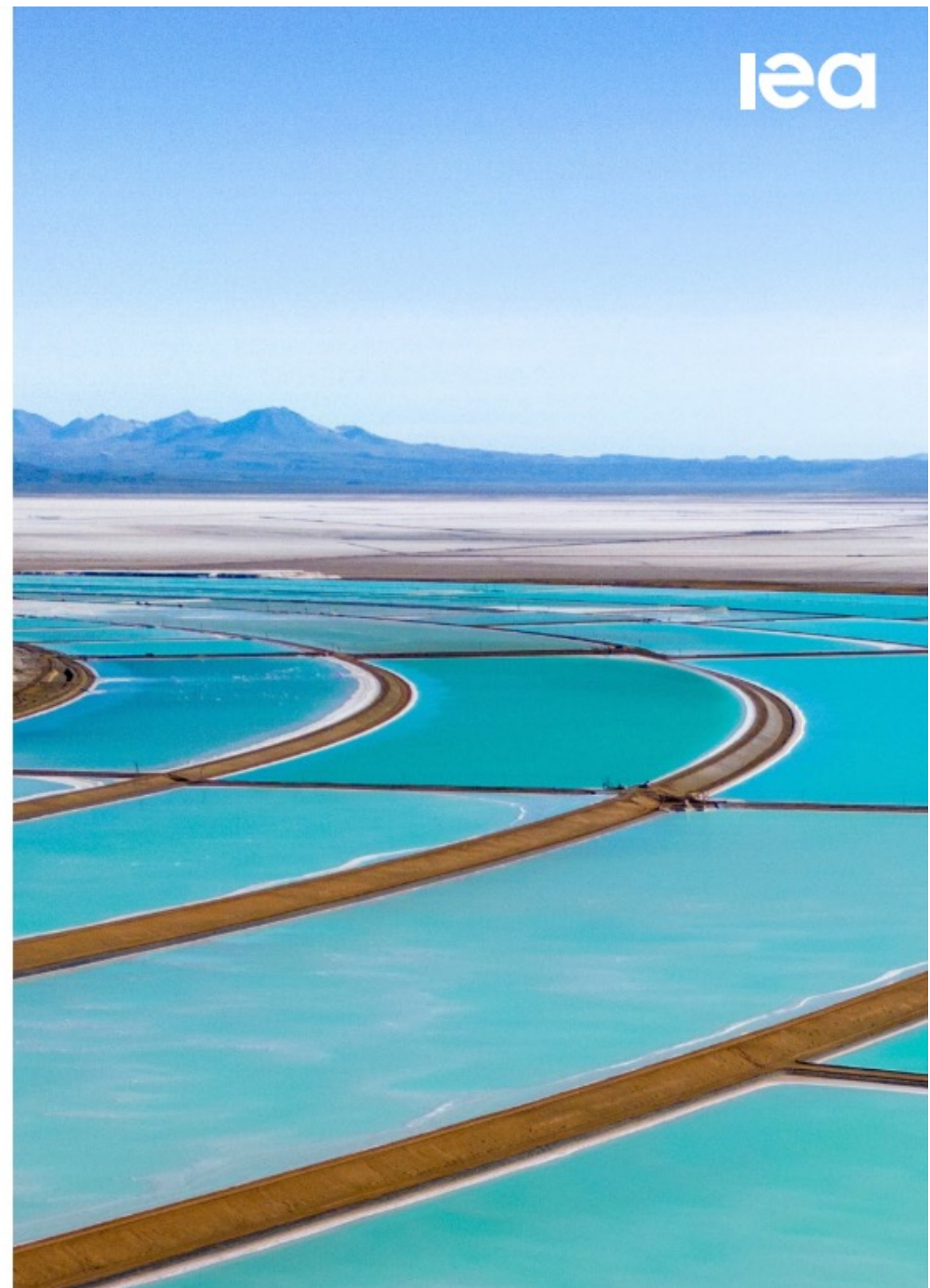
HOSTING PARTNER

Cipher Neutron

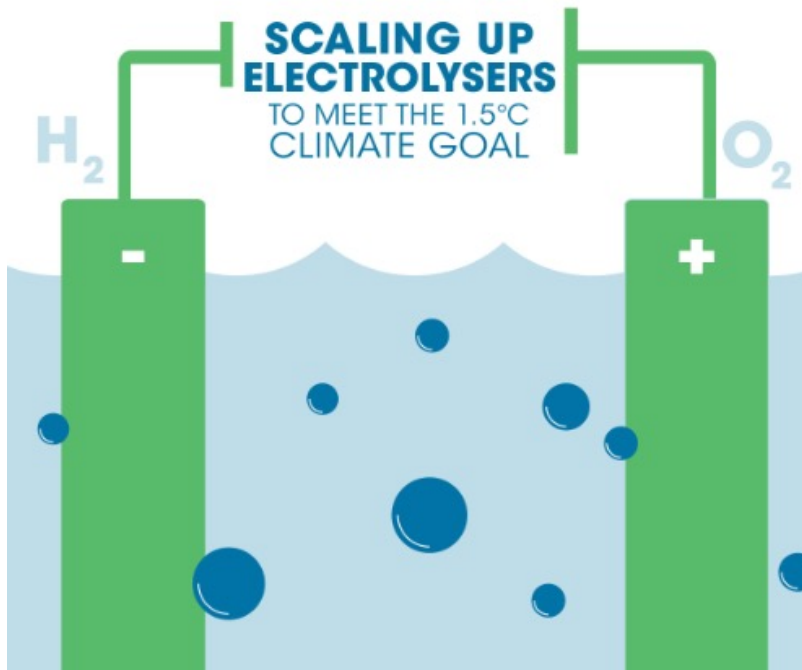
SUPPORTING PARTNER



Global Critical Minerals Outlook 2024

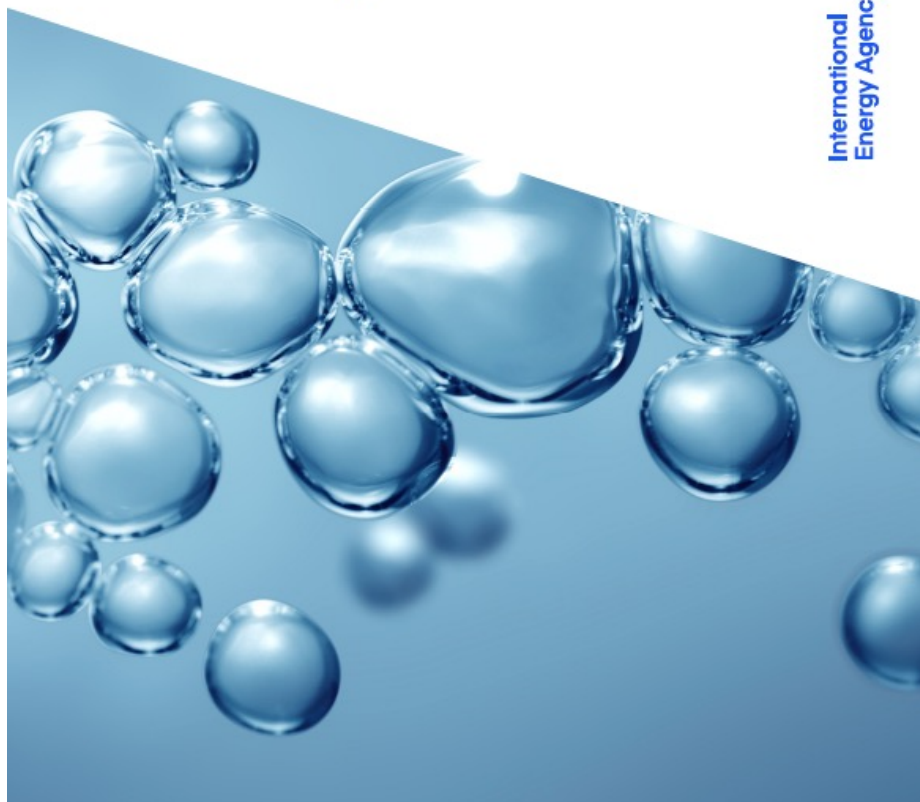


SCALING UP ELECTROLYSERS TO MEET THE 1.5°C CLIMATE GOAL



Towards hydrogen definitions based on their emissions intensity

International
Energy Agency



The Role of Critical Minerals in Clean Energy Transitions

World Energy Outlook Special Report



iea

CLEAN ENERGY
MINISTERIAL
Initiative
Advancing Clean Energy Together

HYDROGEN
INITIATIVE
Advancing the Clean Energy Transition

Global Hydrogen Review 2023

International
Energy Agency

