

Global Hydrogen Buses Market Size Study & Forecast, by Bus Type (Single Deck, Double Deck, and Articulated Deck), By Power Output (Below 100kW, 100-200kW, and Above 200kW), By Technology (Proton Exchange Membrane Fuel Cell (PEMFC), Solid Oxide Fuel Cell (SOFC), and Alkaline Fuel Cell (AFC)), By Manufacturing Type (New Hydrogen Bus and Retrofitted), and Regional Analysis, 2023-2030

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Abstracts

Global Hydrogen Buses Market is valued at approximately USD 0.63 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 55.4% over the forecast period 2023-2030. Hydrogen buses operate using hydrogen fuel cells that chemically convert hydrogen gas into electricity, powering an electric motor to move the bus forward. The primary benefit of hydrogen buses is that they emit no tailpipe emissions since water vapor is the sole consequence of the hydrogen fuel cell operation. They are therefore a greener option than buses that run on gasoline or diesel. In comparison to traditional buses powered by internal combustion engines, these buses also operate more quietly. The rise in greenhouse gas emissions from transportation and rapid urban growth has led to ongoing efforts to reduce pollution and emissions. There is a growing necessity to embrace alternative fuels and powertrains in mobility to enhance urban living standards. As a result, Original Equipment Manufacturers (OEMs) are transitioning to fuel-cell buses to promote cleaner and sustainable transportation solutions. For instance, in September 2022, New Flyer, a subsidiary of NFI Group Inc. known for electric mass mobility solutions, introduced the Xcelsior CHARGE FC heavy-duty bus, which runs on zero-emission hydrogen fuel cell-electric technology. The global hydrogen buses market is experiencing growth due to increasing environmental

awareness, government policies that favor clean energy, and ongoing technological progress aimed at enhancing urban air quality and reducing emissions. These developments have significantly improved the appeal and feasibility of hydrogen buses as a transportation solution, which are attributed to the segment growth across the globe.

In addition, the market growth is being propelled by an increasing demand for cleaner technologies aimed at reducing emission levels. Concerns regarding air pollution and greenhouse gas emissions are fueling a transition towards cleaner transportation alternatives. Numerous regions and countries are enacting stringent emission standards and regulations specifically targeting public transportation. Hydrogen buses are playing a pivotal role in helping transit agencies comply with these regulations to avoid fines or penalties associated with elevated emissions. As per the IEA 2021 report, more than 17 governments have unveiled hydrogen strategies, with an additional 20 governments actively developing similar strategies. This trend has attracted the interest of several Original Equipment Manufacturers (OEMs) looking to capitalize on the opportunities presented by hydrogen buses. For instance, according to the International Energy Agency, in January 2019, Korea unveiled its Hydrogen Economy Roadmap, which outlines the deployment of 35 hydrogen buses in 2019, escalating to 2,000 by 2022 and 41,000 by 2040, thus, contributing to cleaner mobility solutions nationwide. Additionally, as per the International Energy Agency, in March 2022, Denmark made significant commitments to build 6GW of electrolysis capacity, enabling the conversion of renewable energy into green hydrogen to bolster energy security. Danish lawmakers also announced substantial subsidies totaling USD 184.83 million to support hydrogen production and enhance its commercial viability. Moreover, the rise in the advancements in hydrogen fuel cell technology, as well as the growing integration of electric drivetrain in hydrogen buses presents various lucrative opportunities over the forecasting years. However, the high initial costs and limited hydrogen fueling infrastructure are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Hydrogen Buses Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. Asia Pacific dominated the market in 2022 owing to the robust growth of the automotive sector in many developing countries across Asia Pacific. Also, rising government initiatives aimed at reducing emissions and the implementation of supportive policies to encourage sustainable mobility solutions is further supporting the market expansion. Countries in the Asia Pacific region such as Japan, South Korea, and China have demonstrated a strong commitment to advancing hydrogen technologies. Governments in these nations

have offered significant financial support and incentives to foster the development and deployment of hydrogen-powered vehicles, particularly buses. For instance, the International Energy Agency stated in March 2022, the Chinese government unveiled a comprehensive long-term hydrogen plan spanning from 2021 to 2035. This strategic plan is focused on nurturing a domestic hydrogen industry, as well as enhancing technological expertise and manufacturing capabilities in the sector. Whereas Europe is expected to grow at the highest CAGR over the forecast years. The region's strict environmental regulations and ambitious goals for reducing emissions are significantly propelling the market demand across the region. The European Union (EU) has actively championed the development and adoption of hydrogen technologies. Initiatives such as the European Clean Hydrogen Alliance, Joint Initiative for Hydrogen Vehicles (JIVE), and the Connecting Europe Facility (CEF) are pivotal in this effort. These programs offer financial support for hydrogen infrastructure and transportation projects aimed at promoting sustainable mobility.

Major market players included in this report are:

Wrightbus (Ireland)

SOLARIS (Poland)

Tata Motors Limited (India)

Hyundai (South Korea)

Volvo Group (Sweden)

NFI Group Inc. (Canada)

Daimler Buses (Germany)

Hino Motors (Japan)

SunLine Transit Agency (U.S.)

Yutong (China)

Recent Developments in the Market:

In March 2023, CaetanoBus, a Toyota Caetano Portugal subsidiary, unveiled plans to supply 60 hydrogen-powered electric buses to Deutsche Bahn (D.B.) bus division, a major bus service provider in Germany. These buses, featuring Toyota fuel cells, are part of Deutsche Bahn's strategy to eliminate its remaining diesel buses by 2038 and reduce emissions.

In September 2022, Rampini, an Italian bus manufacturer, introduced its inaugural hydrogen fuel cell bus named Hydron. The Hydron is compact at eight meters in length, boasts an impressive range of 450 km, and can comfortably accommodate up to 48 passengers.

In June 2023, Hyundai announced a significant initiative to replace 1,300 internal combustion engine (ICE) buses in Seoul with 1,300 fuel cell buses by 2026, aiming to establish a clean hydrogen ecosystem. This effort aligns with Hyundai's goal of advancing a hydrogen society using its expertise in fuel-cell technologies.

Global Hydrogen Buses Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Bus Type, Power Output, Technology, Manufacturing Type, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Bus Type:

Single Deck

Double Deck

Articulated Deck

By Power Output:

Below 100kW

100-200kW

Above 200kW

By Technology:

Proton Exchange Membrane Fuel Cell (PEMFC)

Solid Oxide Fuel Cells (SOFC)

Alkaline Fuel Cell (AFC)

By Manufacturing Type:

New Hydrogen Bus

Retrofitted

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

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