

Global AEM Electrolyser Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AEM Electrolyser market size is expected to reach \$ 5758 million by 2032, rising at a market growth of 68.2% CAGR during the forecast period (2026-2032). In 2025, global AEM Electrolyser production reached approximately 35 MW, with an average global market price of around US\$2,864 per kW. An advanced technology in water electrolysis, Anion Exchange Membrane (AEM) electrolysis, has emerged as a state-of-the-art method for efficiently separating water into hydrogen and oxygen gases. This innovative approach seamlessly combines the benefits of both Alkaline and Proton Exchange Membrane (PEM) water electrolysis, establishing itself as an exceptionally efficient and cost-effective solution for Green Hydrogen production, ensuring sustainability. AEM Electrolysers distinguish themselves by their impressive capability to deliver high-pressure outputs, reaching up to 30 bar, and generating exceptionally pure hydrogen gas with a purity of 99.9%. Noteworthy is the fact that these accomplishments are achieved without relying on supply chain-constrained Platinum Group Metals (PGMs) or the use of harmful and toxic chemicals. This key feature sets AEM Electrolysers apart from other electrolyzer technologies available in the market. The global market for AEM (Anion Exchange Membrane) electrolyzers is currently at an early stage of commercialization, with technology maturity and market share still far below those of established alkaline (ALK) and proton exchange membrane (PEM) electrolyzers. Technologically, AEM combines the low-cost advantages of alkaline electrolyzers with the fast dynamic response of PEM systems. It can operate without precious metal catalysts such as iridium or ruthenium, offering both cost efficiency and flexibility in catalyst selection, which has attracted substantial investment in research, development, and industrialization. In terms of market dynamics, the global AEM electrolyzer market is highly concentrated, with the top three manufacturers accounting for over 70% of the market share in 2025. Product development focuses on improving energy efficiency, reducing power

consumption, and scaling up to megawatt-level systems. Megawatt-scale electrolyzers are considered the next major growth opportunity, as they can significantly lower the cost per unit of hydrogen and better integrate with intermittent renewable energy sources such as wind and solar. Government subsidies and large demonstration programs, such as IPCEI, are accelerating localized production line construction and pilot deployment.

Regarding corporate dynamics, Enapter is the first company globally to achieve mass production and commercialization of AEM electrolyzers, offering modules ranging from below 70 kW up to 2.5 MW, with production facilities in Italy and Germany. In China, Shenzhen Wenstone Hydrogen Energy Technology Co., Ltd. launched the country's first self-developed 2.5 kW AEM electrolyzer in 2023 and subsequently developed 10 kW integrated systems, with current products reaching megawatt-scale. Qingneng Co., Ltd. focuses on large megawatt-scale AEM electrolyzers and released a 5 MW high-power electrolyzer in 2024. Overall, AEM electrolyzers demonstrate cost-sensitive and fast-response advantages in distributed and industrial hydrogen production, with strong market growth potential, though continued improvements in membrane and stack durability, system integration, and engineering experience remain critical.

This report studies the global AEM Electrolyser production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AEM Electrolyser and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AEM Electrolyser that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AEM Electrolyser total production and demand, 2021-2032, (MW)

Global AEM Electrolyser total production value, 2021-2032, (USD Million)

Global AEM Electrolyser production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global AEM Electrolyser consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: AEM Electrolyser domestic production, consumption, key domestic manufacturers and share

Global AEM Electrolyser production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global AEM Electrolyser production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global AEM Electrolyser production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global AEM Electrolyser market based on the

following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Enapter, Shenzhen Wenstone Hydrogen Energy Technology, Jiangsu Horizon New Energy Technologies, Cipher Neutron, Beijing Green Wave Hydrogen Energy Technology, Zhejiang E-Fuel Hydrogen Energy, EVE Hydrogen Energy, Ansaldo Energia, Beijing Future Hydrogen Technology, Shanghai Qingluan Technology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AEM Electrolyser market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MW) and average price (US\$/kW) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AEM Electrolyser Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AEM Electrolyser Market, Segmentation by Type:

0kW-100kW

100kW-1MW

Above 1MW

Global AEM Electrolyser Market, Segmentation by Production Rate:

500Nm³/h

Global AEM Electrolyser Market, Segmentation by Hydrogen Pressure:

3.5Mpa

Global AEM Electrolyser Market, Segmentation by Application:

Hydrogen Refueling Station

Metallurgy and Steel Industry

Power to Gas

Others

Companies Profiled:

Enapter

Shenzhen Wenstone Hydrogen Energy Technology

Jiangsu Horizon New Energy Technologies

Cipher Neutron

Beijing Green Wave Hydrogen Energy Technology

Zhejiang E-Fuel Hydrogen Energy

EVE Hydrogen Energy

Ansaldo Energia

Beijing Future Hydrogen Technology

Shanghai Qingluan Technology

Key Questions Answered:

1. How big is the global AEM Electrolyser market?
2. What is the demand of the global AEM Electrolyser market?
3. What is the year over year growth of the global AEM Electrolyser market?
4. What is the production and production value of the global AEM Electrolyser market?
5. Who are the key producers in the global AEM Electrolyser market?
6. What are the growth factors driving the market demand?

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