

Global Air-cooled Fuel Cell Stack Technology Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Air-cooled Fuel Cell Stack Technology market size is expected to reach \$ 1790 million by 2032, rising at a market growth of 44.1% CAGR during the forecast period (2026-2032).

Air-cooled fuel cell stack technology uses the principle of fuel cells to convert hydrogen and oxygen into electrical energy and heat energy through chemical reactions. Unlike ordinary fuel cells, this technology uses air cooling technology to dissipate heat, and the heat generated is discharged through fans, thereby achieving efficient and safe energy conversion. Air-cooled fuel cell stacks are mainly composed of cathodes, anodes, electrolytes and catalysts. Under the action of electrolytes, hydrogen and oxygen undergo electrochemical reactions to generate electrical energy and heat energy. At the same time, air-cooled fuel cell stacks also contain fans for heat dissipation and specially designed flow channels to achieve effective thermal management.

Air-cooled fuel cell stacks are a lightweight and innovative solution for proton exchange membrane fuel cells (PEMFCs). They replace traditional liquid cooling systems with fans and specialized flow channel designs, achieving efficient thermal management. Its core advantage lies in eliminating components such as water pumps and radiators, reducing weight by over 30%, and eliminating the risk of leakage, making it a key technology for mobile applications (such as drones, two-wheeled vehicles, and portable power banks). The industry's gross profit margin can reach 20%-40%.

Market drivers mainly include the following:

Mandatory Policy and Standard Upgrades:

China has included hydrogen-powered heavy-duty trucks in its new energy subsidy program, and the EU's Battery Regulation requires a 70% battery recycling rate by 2030, forcing companies to improve product safety and environmental friendliness. Simultaneously, the improvement of international standards (such as IEC 62282) accelerates technical standardization, driving the industry from niche markets to

mainstream applications.

Expanding Application Scenarios and Upgrading Demands

The increasing penetration rate of new energy vehicles, the large-scale deployment of the low-altitude economy (such as electric vertical take-off and landing drones), and the accelerated iteration of consumer electronics place higher demands on battery energy density, charging speed, and safety. For example, hydrogen-powered two-wheeled vehicles need to operate in a wide temperature range of -20° to 60°, and drones need to support charging rates of 6C or higher, driving the iteration of air-cooling technology towards high power and long lifespan.

Technological iteration and ecosystem improvement

Innovative technologies such as solid-state hydrogen storage and closed-loop air-cooled cathodes reduce system complexity and increase energy density; the Hydrogen as a Service (HaaS) model lowers the barrier to entry for end users by integrating fuel cell systems, hydrogen supply, and maintenance services. Furthermore, cross-industry collaborations (such as alliances between energy companies and automakers) accelerate technology implementation, forming a competitive barrier of 'core patents + large-scale production.'

This report studies the global Air-cooled Fuel Cell Stack Technology demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air-cooled Fuel Cell Stack Technology, 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 Air-cooled Fuel Cell Stack Technology that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air-cooled Fuel Cell Stack Technology total market, 2021-2032, (USD Million)

Global Air-cooled Fuel Cell Stack Technology total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Air-cooled Fuel Cell Stack Technology total market, key domestic companies, and share, (USD Million)

Global Air-cooled Fuel Cell Stack Technology revenue by player, revenue and market share 2021-2026, (USD Million)

Global Air-cooled Fuel Cell Stack Technology total market by Type, CAGR, 2021-2032, (USD Million)

Global Air-cooled Fuel Cell Stack Technology total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Air-cooled Fuel Cell Stack Technology market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies

covered as a part of this study include Horizon Fuel Cell Technologies, Jiangsu Huayuan H-Power, Intelligent Energy, Ballard, Hydrogenics, Nedstack, Hydrogen Craft, Shanghai HITS Hydrogen Power Technology, Bohua Hyro, Pearl Hydrogen, 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 Air-cooled Fuel Cell Stack Technology market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Air-cooled Fuel Cell Stack Technology Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Air-cooled Fuel Cell Stack Technology Market, Segmentation by Type:

High Power

Medium and Low Power

Global Air-cooled Fuel Cell Stack Technology Market, Segmentation by Technology:

Regional Air-Cooled Fuel Cell Stacks

Open Cathode Air-Cooled Fuel Cell Stacks

Global Air-cooled Fuel Cell Stack Technology Market, Segmentation by Functional Category:

Mobile Power Type

Stationary Power Generation Type

Special Scenario Type

Global Air-cooled Fuel Cell Stack Technology Market, Segmentation by Application:

Cars

Two-wheeled Vehicles

Drones

Other

Companies Profiled:

Horizon Fuel Cell Technologies

Jiangsu Huayuan H-Power

Intelligent Energy

Ballard

Hydrogenics

Nedstack

Hydrogen Craft

Shanghai HITS Hydrogen Power Technology

Bohua Hyro

Pearl Hydrogen

Key Questions Answered

1. How big is the global Air-cooled Fuel Cell Stack Technology market?
2. What is the demand of the global Air-cooled Fuel Cell Stack Technology market?
3. What is the year over year growth of the global Air-cooled Fuel Cell Stack Technology market?
4. What is the total value of the global Air-cooled Fuel Cell Stack Technology market?
5. Who are the Major Players in the global Air-cooled Fuel Cell Stack Technology market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Air-cooled Fuel Cell Stack Technology Introduction
- 1.2 World Air-cooled Fuel Cell Stack Technology Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Air-cooled Fuel Cell Stack Technology Total Market by Region (by Headquarter Location)
 - 1.3.1 World Air-cooled Fuel Cell Stack Technology Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.3 China Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.4 Europe Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.5 Japan Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
 - 1.3.8 India Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Air-cooled Fuel Cell Stack Technology Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)
- 2.2 World Air-cooled Fuel Cell Stack Technology Consumption Value by Region
 - 2.2.1 World Air-cooled Fuel Cell Stack Technology Consumption Value by Region (2021-2026)
 - 2.2.2 World Air-cooled Fuel Cell Stack Technology Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Air-cooled Fuel Cell Stack Technology Consumption Value

(2021-2032)

2.4 China Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)

2.5 Europe Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)

2.6 Japan Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)

2.7 South Korea Air-cooled Fuel Cell Stack Technology Consumption Value
(2021-2032)

2.8 ASEAN Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)

2.9 India Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032)

3 WORLD AIR-COOLED FUEL CELL STACK TECHNOLOGY COMPANIES COMPETITIVE ANALYSIS

3.1 World Air-cooled Fuel Cell Stack Technology Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Air-cooled Fuel Cell Stack Technology Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Air-cooled Fuel Cell Stack Technology in
2025

3.2.3 Global Concentration Ratios (CR8) for Air-cooled Fuel Cell Stack Technology in
2025

3.3 Air-cooled Fuel Cell Stack Technology Company Evaluation Quadrant

3.4 Air-cooled Fuel Cell Stack Technology Market: Overall Company Footprint Analysis

3.4.1 Air-cooled Fuel Cell Stack Technology Market: Region Footprint

3.4.2 Air-cooled Fuel Cell Stack Technology Market: Company Product Type Footprint

3.4.3 Air-cooled Fuel Cell Stack Technology Market: Company Product Application
Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Air-cooled Fuel Cell Stack Technology Revenue
Comparison (by Headquarter Location)

4.1.1 United States VS China: Air-cooled Fuel Cell Stack Technology Revenue
Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Air-cooled Fuel Cell Stack Technology Revenue Market

Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Air-cooled Fuel Cell Stack Technology Consumption Value Comparison

4.2.1 United States VS China: Air-cooled Fuel Cell Stack Technology Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Air-cooled Fuel Cell Stack Technology Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Air-cooled Fuel Cell Stack Technology Companies and Market Share, 2021-2026

4.3.1 United States Based Air-cooled Fuel Cell Stack Technology Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Air-cooled Fuel Cell Stack Technology Revenue, (2021-2026)

4.4 China Based Companies Air-cooled Fuel Cell Stack Technology Revenue and Market Share, 2021-2026

4.4.1 China Based Air-cooled Fuel Cell Stack Technology Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Air-cooled Fuel Cell Stack Technology Revenue, (2021-2026)

4.5 Rest of World Based Air-cooled Fuel Cell Stack Technology Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Air-cooled Fuel Cell Stack Technology Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Air-cooled Fuel Cell Stack Technology Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Air-cooled Fuel Cell Stack Technology Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 High Power

5.2.2 Medium and Low Power

5.3 Market Segment by Type

5.3.1 World Air-cooled Fuel Cell Stack Technology Market Size by Type (2021-2026)

5.3.2 World Air-cooled Fuel Cell Stack Technology Market Size by Type (2027-2032)

5.3.3 World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY TECHNOLOGY

6.1 World Air-cooled Fuel Cell Stack Technology Market Size Overview by Technology: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Technology

6.2.1 Regional Air-Cooled Fuel Cell Stacks

6.2.2 Open Cathode Air-Cooled Fuel Cell Stacks

6.3 Market Segment by Technology

6.3.1 World Air-cooled Fuel Cell Stack Technology Market Size by Technology (2021-2026)

6.3.2 World Air-cooled Fuel Cell Stack Technology Market Size by Technology (2027-2032)

6.3.3 World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Technology (2027-2032)

7 MARKET ANALYSIS BY FUNCTIONAL CATEGORY

7.1 World Air-cooled Fuel Cell Stack Technology Market Size Overview by Functional Category: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Functional Category

7.2.1 Mobile Power Type

7.2.2 Stationary Power Generation Type

7.2.3 Special Scenario Type

7.3 Market Segment by Functional Category

7.3.1 World Air-cooled Fuel Cell Stack Technology Market Size by Functional Category (2021-2026)

7.3.2 World Air-cooled Fuel Cell Stack Technology Market Size by Functional Category (2027-2032)

7.3.3 World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Functional Category (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Air-cooled Fuel Cell Stack Technology Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Cars

8.2.2 Two-wheeled Vehicles

8.2.3 Drones

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World Air-cooled Fuel Cell Stack Technology Market Size by Application (2021-2026)

8.3.2 World Air-cooled Fuel Cell Stack Technology Market Size by Application (2027-2032)

8.3.3 World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Horizon Fuel Cell Technologies

9.1.1 Horizon Fuel Cell Technologies Details

9.1.2 Horizon Fuel Cell Technologies Major Business

9.1.3 Horizon Fuel Cell Technologies Air-cooled Fuel Cell Stack Technology Product and Services

9.1.4 Horizon Fuel Cell Technologies Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Horizon Fuel Cell Technologies Recent Developments/Updates

9.1.6 Horizon Fuel Cell Technologies Competitive Strengths & Weaknesses

9.2 Jiangsu Huayuan H-Power

9.2.1 Jiangsu Huayuan H-Power Details

9.2.2 Jiangsu Huayuan H-Power Major Business

9.2.3 Jiangsu Huayuan H-Power Air-cooled Fuel Cell Stack Technology Product and Services

9.2.4 Jiangsu Huayuan H-Power Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Jiangsu Huayuan H-Power Recent Developments/Updates

9.2.6 Jiangsu Huayuan H-Power Competitive Strengths & Weaknesses

9.3 Intelligent Energy

9.3.1 Intelligent Energy Details

9.3.2 Intelligent Energy Major Business

9.3.3 Intelligent Energy Air-cooled Fuel Cell Stack Technology Product and Services

9.3.4 Intelligent Energy Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 Intelligent Energy Recent Developments/Updates

9.3.6 Intelligent Energy Competitive Strengths & Weaknesses

9.4 Ballard

9.4.1 Ballard Details

- 9.4.2 Ballard Major Business
- 9.4.3 Ballard Air-cooled Fuel Cell Stack Technology Product and Services
- 9.4.4 Ballard Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)
- 9.4.5 Ballard Recent Developments/Updates
- 9.4.6 Ballard Competitive Strengths & Weaknesses
- 9.5 Hydrogenics
 - 9.5.1 Hydrogenics Details
 - 9.5.2 Hydrogenics Major Business
 - 9.5.3 Hydrogenics Air-cooled Fuel Cell Stack Technology Product and Services
 - 9.5.4 Hydrogenics Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Hydrogenics Recent Developments/Updates
 - 9.5.6 Hydrogenics Competitive Strengths & Weaknesses
- 9.6 Nedstack
 - 9.6.1 Nedstack Details
 - 9.6.2 Nedstack Major Business
 - 9.6.3 Nedstack Air-cooled Fuel Cell Stack Technology Product and Services
 - 9.6.4 Nedstack Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Nedstack Recent Developments/Updates
 - 9.6.6 Nedstack Competitive Strengths & Weaknesses
- 9.7 Hydrogen Craft
 - 9.7.1 Hydrogen Craft Details
 - 9.7.2 Hydrogen Craft Major Business
 - 9.7.3 Hydrogen Craft Air-cooled Fuel Cell Stack Technology Product and Services
 - 9.7.4 Hydrogen Craft Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Hydrogen Craft Recent Developments/Updates
 - 9.7.6 Hydrogen Craft Competitive Strengths & Weaknesses
- 9.8 Shanghai HITS Hydrogen Power Technology
 - 9.8.1 Shanghai HITS Hydrogen Power Technology Details
 - 9.8.2 Shanghai HITS Hydrogen Power Technology Major Business
 - 9.8.3 Shanghai HITS Hydrogen Power Technology Air-cooled Fuel Cell Stack Technology Product and Services
 - 9.8.4 Shanghai HITS Hydrogen Power Technology Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Shanghai HITS Hydrogen Power Technology Recent Developments/Updates
 - 9.8.6 Shanghai HITS Hydrogen Power Technology Competitive Strengths &

Weaknesses

9.9 Bohua Hyro

9.9.1 Bohua Hyro Details

9.9.2 Bohua Hyro Major Business

9.9.3 Bohua Hyro Air-cooled Fuel Cell Stack Technology Product and Services

9.9.4 Bohua Hyro Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Bohua Hyro Recent Developments/Updates

9.9.6 Bohua Hyro Competitive Strengths & Weaknesses

9.10 Pearl Hydrogen

9.10.1 Pearl Hydrogen Details

9.10.2 Pearl Hydrogen Major Business

9.10.3 Pearl Hydrogen Air-cooled Fuel Cell Stack Technology Product and Services

9.10.4 Pearl Hydrogen Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Pearl Hydrogen Recent Developments/Updates

9.10.6 Pearl Hydrogen Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Air-cooled Fuel Cell Stack Technology Industry Chain

10.2 Air-cooled Fuel Cell Stack Technology Upstream Analysis

10.3 Air-cooled Fuel Cell Stack Technology Midstream Analysis

10.4 Air-cooled Fuel Cell Stack Technology Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Air-cooled Fuel Cell Stack Technology Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Table 2. World Air-cooled Fuel Cell Stack Technology Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
- Table 3. World Air-cooled Fuel Cell Stack Technology Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
- Table 4. World Air-cooled Fuel Cell Stack Technology Revenue Market Share by Region (2021-2026), (by Headquarter Location)
- Table 5. World Air-cooled Fuel Cell Stack Technology Revenue Market Share by Region (2027-2032), (by Headquarter Location)
- Table 6. Major Market Trends
- Table 7. World Air-cooled Fuel Cell Stack Technology Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
- Table 8. World Air-cooled Fuel Cell Stack Technology Consumption Value by Region (2021-2026) & (USD Million)
- Table 9. World Air-cooled Fuel Cell Stack Technology Consumption Value Forecast by Region (2027-2032) & (USD Million)
- Table 10. World Air-cooled Fuel Cell Stack Technology Revenue by Player (2021-2026) & (USD Million)
- Table 11. Revenue Market Share of Key Air-cooled Fuel Cell Stack Technology Players in 2025
- Table 12. World Air-cooled Fuel Cell Stack Technology Industry Rank of Major Player, Based on Revenue in 2025
- Table 13. Global Air-cooled Fuel Cell Stack Technology Company Evaluation Quadrant
- Table 14. Head Office of Key Air-cooled Fuel Cell Stack Technology Players
- Table 15. Air-cooled Fuel Cell Stack Technology Market: Company Product Type Footprint
- Table 16. Air-cooled Fuel Cell Stack Technology Market: Company Product Application Footprint
- Table 17. Air-cooled Fuel Cell Stack Technology Mergers & Acquisitions Activity
- Table 18. United States VS China Air-cooled Fuel Cell Stack Technology Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 19. United States VS China Air-cooled Fuel Cell Stack Technology Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 20. United States Based Air-cooled Fuel Cell Stack Technology Companies,

Headquarters (States, Country)

Table 21. United States Based Companies Air-cooled Fuel Cell Stack Technology Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Air-cooled Fuel Cell Stack Technology Revenue Market Share (2021-2026)

Table 23. China Based Air-cooled Fuel Cell Stack Technology Companies, Headquarters (Province, Country)

Table 24. China Based Companies Air-cooled Fuel Cell Stack Technology Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Air-cooled Fuel Cell Stack Technology Revenue Market Share (2021-2026)

Table 26. Rest of World Based Air-cooled Fuel Cell Stack Technology Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Air-cooled Fuel Cell Stack Technology Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Air-cooled Fuel Cell Stack Technology Revenue Market Share (2021-2026)

Table 29. World Air-cooled Fuel Cell Stack Technology Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Air-cooled Fuel Cell Stack Technology Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Air-cooled Fuel Cell Stack Technology Market Size by Type (2027-2032) & (USD Million)

Table 32. World Air-cooled Fuel Cell Stack Technology Market Size by Technology, (USD Million), 2021 & 2025 & 2032

Table 33. World Air-cooled Fuel Cell Stack Technology Market Size Value by Technology (2021-2026) & (USD Million)

Table 34. World Air-cooled Fuel Cell Stack Technology Market Size by Technology (2027-2032) & (USD Million)

Table 35. World Air-cooled Fuel Cell Stack Technology Market Size by Functional Category, (USD Million), 2021 & 2025 & 2032

Table 36. World Air-cooled Fuel Cell Stack Technology Market Size Value by Functional Category (2021-2026) & (USD Million)

Table 37. World Air-cooled Fuel Cell Stack Technology Market Size by Functional Category (2027-2032) & (USD Million)

Table 38. World Air-cooled Fuel Cell Stack Technology Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Air-cooled Fuel Cell Stack Technology Market Size by Application (2021-2026) & (USD Million)

Table 40. World Air-cooled Fuel Cell Stack Technology Market Size by Application (2027-2032) & (USD Million)

Table 41. Horizon Fuel Cell Technologies Basic Information, Manufacturing Base and Competitors

Table 42. Horizon Fuel Cell Technologies Major Business

Table 43. Horizon Fuel Cell Technologies Air-cooled Fuel Cell Stack Technology Product and Services

Table 44. Horizon Fuel Cell Technologies Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Horizon Fuel Cell Technologies Recent Developments/Updates

Table 46. Horizon Fuel Cell Technologies Competitive Strengths & Weaknesses

Table 47. Jiangsu Huayuan H-Power Basic Information, Manufacturing Base and Competitors

Table 48. Jiangsu Huayuan H-Power Major Business

Table 49. Jiangsu Huayuan H-Power Air-cooled Fuel Cell Stack Technology Product and Services

Table 50. Jiangsu Huayuan H-Power Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Jiangsu Huayuan H-Power Recent Developments/Updates

Table 52. Jiangsu Huayuan H-Power Competitive Strengths & Weaknesses

Table 53. Intelligent Energy Basic Information, Manufacturing Base and Competitors

Table 54. Intelligent Energy Major Business

Table 55. Intelligent Energy Air-cooled Fuel Cell Stack Technology Product and Services

Table 56. Intelligent Energy Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Intelligent Energy Recent Developments/Updates

Table 58. Intelligent Energy Competitive Strengths & Weaknesses

Table 59. Ballard Basic Information, Manufacturing Base and Competitors

Table 60. Ballard Major Business

Table 61. Ballard Air-cooled Fuel Cell Stack Technology Product and Services

Table 62. Ballard Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Ballard Recent Developments/Updates

Table 64. Ballard Competitive Strengths & Weaknesses

Table 65. Hydrogenics Basic Information, Manufacturing Base and Competitors

Table 66. Hydrogenics Major Business

Table 67. Hydrogenics Air-cooled Fuel Cell Stack Technology Product and Services

Table 68. Hydrogenics Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin

and Market Share (2021-2026) & (USD Million)

Table 69. Hydrogenics Recent Developments/Updates

Table 70. Hydrogenics Competitive Strengths & Weaknesses

Table 71. Nedstack Basic Information, Manufacturing Base and Competitors

Table 72. Nedstack Major Business

Table 73. Nedstack Air-cooled Fuel Cell Stack Technology Product and Services

Table 74. Nedstack Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. Nedstack Recent Developments/Updates

Table 76. Nedstack Competitive Strengths & Weaknesses

Table 77. Hydrogen Craft Basic Information, Manufacturing Base and Competitors

Table 78. Hydrogen Craft Major Business

Table 79. Hydrogen Craft Air-cooled Fuel Cell Stack Technology Product and Services

Table 80. Hydrogen Craft Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Hydrogen Craft Recent Developments/Updates

Table 82. Hydrogen Craft Competitive Strengths & Weaknesses

Table 83. Shanghai HITS Hydrogen Power Technology Basic Information, Manufacturing Base and Competitors

Table 84. Shanghai HITS Hydrogen Power Technology Major Business

Table 85. Shanghai HITS Hydrogen Power Technology Air-cooled Fuel Cell Stack Technology Product and Services

Table 86. Shanghai HITS Hydrogen Power Technology Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Shanghai HITS Hydrogen Power Technology Recent Developments/Updates

Table 88. Shanghai HITS Hydrogen Power Technology Competitive Strengths & Weaknesses

Table 89. Bohua Hyro Basic Information, Manufacturing Base and Competitors

Table 90. Bohua Hyro Major Business

Table 91. Bohua Hyro Air-cooled Fuel Cell Stack Technology Product and Services

Table 92. Bohua Hyro Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Bohua Hyro Recent Developments/Updates

Table 94. Bohua Hyro Competitive Strengths & Weaknesses

Table 95. Pearl Hydrogen Basic Information, Manufacturing Base and Competitors

Table 96. Pearl Hydrogen Major Business

Table 97. Pearl Hydrogen Air-cooled Fuel Cell Stack Technology Product and Services

Table 98. Pearl Hydrogen Air-cooled Fuel Cell Stack Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Pearl Hydrogen Recent Developments/Updates

Table 100. Pearl Hydrogen Competitive Strengths & Weaknesses

Table 101. Global Key Players of Air-cooled Fuel Cell Stack Technology Upstream
(Raw Materials)

Table 102. Global Air-cooled Fuel Cell Stack Technology Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Air-cooled Fuel Cell Stack Technology Picture

Figure 2. World Air-cooled Fuel Cell Stack Technology Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Air-cooled Fuel Cell Stack Technology Total Revenue (2021-2032) & (USD Million)

Figure 4. World Air-cooled Fuel Cell Stack Technology Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Air-cooled Fuel Cell Stack Technology Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Air-cooled Fuel Cell Stack Technology Revenue (2021-2032) & (USD Million)

Figure 13. Air-cooled Fuel Cell Stack Technology Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)

Figure 16. World Air-cooled Fuel Cell Stack Technology Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)

Figure 18. China Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)

- Figure 20. Japan Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)
- Figure 21. South Korea Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)
- Figure 22. ASEAN Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)
- Figure 23. India Air-cooled Fuel Cell Stack Technology Consumption Value (2021-2032) & (USD Million)
- Figure 24. Producer Shipments of Air-cooled Fuel Cell Stack Technology by Player Revenue (\$MM) and Market Share (%): 2025
- Figure 25. Global Four-firm Concentration Ratios (CR4) for Air-cooled Fuel Cell Stack Technology Markets in 2025
- Figure 26. Global Four-firm Concentration Ratios (CR8) for Air-cooled Fuel Cell Stack Technology Markets in 2025
- Figure 27. United States VS China: Air-cooled Fuel Cell Stack Technology Revenue Market Share Comparison (2021 & 2025 & 2032)
- Figure 28. United States VS China: Air-cooled Fuel Cell Stack Technology Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. World Air-cooled Fuel Cell Stack Technology Market Size by Type, (USD Million), 2021 & 2025 & 2032
- Figure 30. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Type in 2025
- Figure 31. High Power
- Figure 32. Medium and Low Power
- Figure 33. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Type (2021-2032)
- Figure 34. World Air-cooled Fuel Cell Stack Technology Market Size by Technology, (USD Million), 2021 & 2025 & 2032
- Figure 35. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Technology in 2025
- Figure 36. Regional Air-Cooled Fuel Cell Stacks
- Figure 37. Open Cathode Air-Cooled Fuel Cell Stacks
- Figure 38. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Technology (2021-2032)
- Figure 39. World Air-cooled Fuel Cell Stack Technology Market Size by Functional Category, (USD Million), 2021 & 2025 & 2032
- Figure 40. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Functional Category in 2025
- Figure 41. Mobile Power Type

Figure 42. Stationary Power Generation Type

Figure 43. Special Scenario Type

Figure 44. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Functional Category (2021-2032)

Figure 45. World Air-cooled Fuel Cell Stack Technology Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 46. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Application in 2025

Figure 47. Cars

Figure 48. Two-wheeled Vehicles

Figure 49. Drones

Figure 50. Other

Figure 51. World Air-cooled Fuel Cell Stack Technology Market Size Market Share by Application (2021-2032)

Figure 52. Air-cooled Fuel Cell Stack Technology Industrial Chain

Figure 53. Methodology

Figure 54. Research Process and Data Source

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