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Global On-Site Hydrogen Production Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global On-Site Hydrogen Production market size is expected to reach $ 26672 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

On-Site Hydrogen Production refers to the generation of hydrogen directly at or near the point of consumption, also known as point-of-use or decentralized hydrogen generation. Commercial systems convert natural gas, biomethane, water, methanol, ammonia or other hydrogen-bearing feedstocks into hydrogen of a specified purity, pressure and production rate. A complete installation generally integrates feedstock pretreatment, reforming, cracking or electrolysis equipment, gas-liquid separation, purification, compression, buffer storage, utilities, process control, remote monitoring and safety protection. Product configurations range from compact laboratory generators and factory-assembled skids to containerized modular packages and large site-built captive plants. This study focuses on commercial hydrogen-generation equipment, integrated production systems, engineering and commissioning services, controls and lifecycle support used in chemical and petrochemical processing, refining, metals, electronics, semiconductors, glass, food, pharmaceuticals, power generation, laboratories, hydrogen refueling, distributed energy and backup power. The market is evaluated by production route, hydrogen production capacity, installation configuration and downstream application, with system output measured using the total nameplate hydrogen capacity under stated normal reference conditions.

Key Findings

Water electrolysis is the fastest-expanding route while natural gas reforming

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retains the largest established industrial base

Skid-mounted and containerized systems are gaining share through faster deployment and modular capacity expansion

China leads electrolyser deployment and manufacturing while Europe and North America maintain diversified technology ecosystems

Industrial customers prioritize hydrogen cost purity pressure availability and lifecycle support over the generation core alone

Equipment sales turnkey plants and build-own-operate hydrogen contracts require separate market accounting

Market Trends

The market is shifting from standalone hydrogen generators toward factory-tested, digitally controlled production packages integrating pretreatment, generation, purification, compression, storage and remote operations. Skid-mounted and containerized systems are gaining importance because they shorten installation schedules, reduce site work and allow capacity to be expanded through additional modules. Water electrolysis is moving simultaneously toward compact point-of-use products and multi-megawatt industrial plants, with alkaline technology emphasizing scale and lower material cost, PEM emphasizing dynamic operation and pressurized output, AEM targeting modularity with reduced dependence on precious metals, and solid oxide electrolysis pursuing higher electrical efficiency where process heat is available. The IEA Global Hydrogen Review 2026 records that installed water-electrolysis capacity doubled in 2025 to exceed 4 GW, while more than 2.5 GW was under construction for planned operation in 2026; however, low-emissions hydrogen still accounted for only slightly more than 1% of global hydrogen production, confirming the continuing importance of conventional reforming systems during the transition period. IEA Global Hydrogen Review 2026 Reforming platforms are being adapted for biomethane and renewable methanol, while ammonia cracking is progressing from demonstration systems toward industrial, mobility, maritime and import-terminal applications. Across all routes, competition is increasingly determined by total hydrogen cost, energy consumption, turndown capability, output pressure, purity stability, automated operation, carbon intensity and service availability rather than nominal production capacity alone.

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Market Dynamics

Drivers

Growth is primarily driven by the need to secure reliable hydrogen supply while reducing dependence on cylinders, tube trailers, liquid-hydrogen deliveries and large on-site inventories. Continuous users in refining, chemicals, metal heat treatment, float glass, semiconductor manufacturing and power-generator cooling can achieve operational benefits by matching production to consumption and maintaining only limited backup storage. Industrial decarbonization is creating additional demand for electrolyzers and lower-carbon reforming systems as refiners, chemical producers, steelmakers and electronics manufacturers seek to reduce the emissions intensity of existing hydrogen consumption. Renewable-power expansion, corporate emission targets, hydrogen-support policies and demand for greater energy security reinforce this transition. Standardized skids and containers also lower engineering complexity, shorten commissioning periods and permit phased investment, making on-site production accessible to medium-volume users that could not economically justify a conventional site-built hydrogen plant.

Restraints

High initial investment and dependence on reliable utilities remain the principal restraints. Electrolysis economics are highly sensitive to electricity price, utilization rate, grid-connection cost, water quality and renewable-power availability, whereas natural-gas and methanol reformers are affected by feedstock prices, catalyst performance and carbon costs. Customers with low, irregular or seasonal hydrogen demand may continue to prefer delivered hydrogen because dedicated equipment would operate at insufficient utilization. Reforming routes generate carbon dioxide unless renewable feedstocks or carbon-management measures are adopted, while ammonia cracking requires thermal energy, ammonia-slip control and deep purification for fuel-cell-grade hydrogen. Hydrogen installations also require hazardous-area engineering, ventilation, leak detection, pressure protection, fire safety and local permitting. Variations in required purity, outlet pressure, load profile and backup philosophy limit full standardization and increase site-specific engineering costs.

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Opportunities

The most immediate opportunity lies in replacing delivered hydrogen for medium-volume industrial users that have predictable demand and place a high value on supply continuity. Metal heat treatment, glass, electronics, polysilicon, generator cooling, specialty chemicals and food hydrogenation are suitable for modular systems supported by compressed or liquid backup. Hydrogen refueling stations, warehouses and distribution centers create demand for integrated production, compression, storage and dispensing packages, while distributed generation and backup power support compact electrolysis, methanol-reforming and ammonia-cracking systems. Sites without pipeline natural gas may use methanol as a liquid hydrogen carrier, whereas ports and industrial clusters receiving low-carbon ammonia may produce high-purity hydrogen near consumption through cracking and membrane separation. Additional opportunities arise from biomethane reforming, methane pyrolysis, oxygen by-product utilization and hybrid systems that operate electrolysis during low-price electricity periods while retaining backup supply. Operation and maintenance contracts, stack refurbishment, catalyst and adsorbent replacement, remote monitoring, purity certification and hydrogen-as-a-service models provide recurring revenue beyond initial equipment sales.

Challenges

Project delays, uncertain offtake and changing support mechanisms remain major commercial risks. The IEA’s 2026 assessment indicates that the announced low-emissions hydrogen production pipeline for 2030 contracted materially and that more than 100 GW of announced electrolysis capacity could miss 2030 operation without timely investment decisions. This gap between manufacturing capacity and project execution increases price pressure, working-capital requirements and consolidation risk for equipment suppliers. Manufacturers must also guarantee hydrogen output, purity, pressure, availability and energy consumption over long operating periods. Electrolyzer suppliers face stack degradation, water-quality sensitivity and scarce-material exposure; reformer manufacturers must manage feedstock desulfurization, thermal cycling and catalyst life; ammonia-cracking suppliers must control conversion efficiency and residual ammonia. Commercial comparison is further complicated by different business models, including equipment sales, technology licensing, turnkey EPC delivery, leasing and build-own-operate supply contracts, which cannot be evaluated through equipment revenue alone.

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Industry Chain Analysis

The upstream segment supplies reforming and cracking catalysts, electrolyzer stacks, membranes, electrodes, porous transport layers, bipolar plates, seals, rectifiers, transformers, power electronics, deionized-water systems, burners, heat exchangers, pumps, PSA adsorbents, compressors, valves, pressure vessels, hydrogen sensors, gas analyzers and industrial control equipment. Methanol systems additionally require liquid-feed preparation and copper-based reforming catalysts, while ammonia crackers require high-temperature catalysts and hydrogen-separation or purification modules. Midstream companies develop the production process, manufacture the reformer, cracker or electrolyzer, integrate balance-of-plant equipment and deliver skid-mounted, containerized or site-built systems. Value creation increasingly depends on process integration, energy optimization, hazardous-area design, factory testing, installation, commissioning, performance guarantees, digital monitoring and lifecycle maintenance rather than the generation core alone. Industrial-gas companies may retain plant ownership and sell hydrogen under long-term on-site supply contracts, while independent OEMs generally earn revenue from equipment, engineering, commissioning and service. Downstream customers include refineries, chemical and petrochemical plants, metal processors, semiconductor and electronics manufacturers, glass producers, food and pharmaceutical companies, power stations, laboratories, hydrogen refueling operators, logistics fleets, distributed-energy developers and backup-power users. Purification, compression, storage, controls and long-term operational support account for a growing share of system value.

Segment Insights

The proposed process classification is fundamentally valid but should be normalized as Natural Gas and Biomethane Reforming On-Site Hydrogen Production Systems, Water Electrolysis On-Site Hydrogen Production Systems, Methanol Reforming On-Site Hydrogen Production Systems, Ammonia Cracking On-Site Hydrogen Production Systems and Other On-Site Hydrogen Production Systems. The additional category can accommodate methane pyrolysis, biomass-derived hydrogen and other emerging commercial routes without distorting the four established segments. Water electrolysis should be further analyzed by alkaline, PEM, AEM and solid oxide technology because their cost structure, operating flexibility, system scale and target applications differ materially. Natural-gas reforming retains advantages for stable baseload consumption where gas infrastructure is available, water electrolysis benefits from low-carbon electricity and flexible operation, methanol reforming suits decentralized locations

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without gas pipelines, and ammonia cracking is positioned for sites using ammonia as a transportable hydrogen carrier.

The proposed capacity boundaries can be retained as Small-Scale Systems of up to 100 Nm³/h, Medium-Scale Systems above 100 and up to 1,000 Nm³/h, and Large-Scale Systems above 1,000 Nm³/h. Classification should use the total nameplate output of the delivered production system rather than the capacity of an individual stack or module, and the applicable normal temperature and pressure reference should be recorded. For electrolysis products marketed in megawatts, the supplier's stated hydrogen output should take precedence over a standardized conversion because system efficiency varies. Installation configuration should be assigned according to the final delivery architecture: an open or indoor factory-assembled process package is skid-mounted, an enclosed modular package is containerized, and a plant whose major equipment and interconnections are assembled at the customer site is site-built. Containerized systems should be recorded as containerized even when internal equipment is mounted on skids, preserving mutually exclusive statistics.

Downstream Market Opportunities

The application structure is Chemical, Petrochemical and Refining; Metal Heat Treatment and Metallurgy; Electronics and Semiconductor Manufacturing; Glass Manufacturing; Food and Pharmaceutical Processing; Power Generation and Generator Cooling; Hydrogen Refueling and Mobility; Distributed Energy and Backup Power; Laboratories and Research Institutions; and Others. Chemical, petrochemical and refining users provide the deepest demand base for medium- and large-scale continuous systems, while metals, electronics, semiconductors and glass offer attractive opportunities for packaged equipment because hydrogen purity and uninterrupted supply directly affect product quality. Generator cooling is an established market for smaller electrolytic generators. Refueling stations and material-handling fleets require close integration between production, compression, storage and dispensing, creating higher system value but also more demanding reliability and certification requirements. Distributed energy, telecommunications and data-center backup power provide opportunities for compact electrolysis and carrier-reforming systems, whereas laboratories typically require lower production rates but higher purity, automation and ease of operation.

Regional Insights

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Asia-Pacific is the principal center for electrolyzer manufacturing and large project deployment, led by China's alkaline-electrolysis supply chain and industrial demand from chemicals, refining, metals and renewable-energy integration. LONGi Hydrogen, PERIC Hydrogen Technologies and Sungrow Hydrogen are important Chinese equipment participants. Japan has a differentiated position in compact reforming and advanced electrolysis: Mitsubishi Kakoki's HyGeia platform serves industrial point-of-use applications, while Asahi Kasei is developing both large alkaline systems and containerized products. Mitsubishi Kakoki HyGeia Asahi Kasei Aqualyzer Japan, South Korea and Taiwan also generate specialized demand from semiconductors, electronics, mobility and distributed power.

Europe has the most diversified technology ecosystem, spanning industrial gases, modular steam reforming, alkaline, PEM and AEM electrolysis, methanol reforming and membrane-assisted ammonia cracking. Demand is linked to refining compliance, industrial decarbonization, renewable hydrogen and Power-to-X, although high electricity costs and delayed investment decisions constrain deployment. North America combines an established on-site industrial-gas market with PEM electrolysis, material handling, mobility, data-center power and regional hydrogen hubs. The Middle East and Australia are oriented toward larger renewable-hydrogen and derivative projects, while Southeast Asia and Latin America remain project-led markets in which renewable-resource quality, imported equipment cost, financing and local service capability determine adoption. Regional competition therefore differs between China's manufacturing-scale model, Europe's technology-diverse and policy-driven model, North America's integrated supply and service model, and emerging regions' EPC-led project model.

Competitive Landscape Analysis

The competitive landscape should be assessed by technology and business model rather than through a single company ranking. Air Products and Chemicals, Air Liquide and Linde form the integrated industrial-gas and engineering group, offering combinations of equipment, turnkey plants and long-term on-site hydrogen supply; Air Products' PRISM and Linde's HYDROPRIME are established modular reforming platforms. Air Products PRISM Linde HYDROPRIME Nel, Accelera by Cummins, Plug Power, ITM Power, Enapter, John Cockerill Hydrogen, LONGi Hydrogen and PERIC Hydrogen Technologies are verified electrolyzer suppliers; HyGear, Mahler AGS, OneH2 and Mitsubishi Kakoki are verified providers of commercial on-site reforming systems. OneH2 also manufactures integrated generation, compression and fueling

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equipment in-house. OneH2 On-Site Generation Element 1 is more appropriately positioned as a methanol-to-hydrogen technology and product-platform provider because licensed partners participate in equipment manufacturing. Competition centers on delivered hydrogen cost, energy efficiency, purity, pressure, turndown, availability, installation time, carbon intensity, performance guarantees and lifecycle service coverage.

Report Scope

This report studies the global On-Site Hydrogen Production demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for On-Site Hydrogen Production, 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 On-Site Hydrogen Production that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global On-Site Hydrogen Production total market, 2021-2032, (USD Million)

Global On-Site Hydrogen Production total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: On-Site Hydrogen Production total market, key domestic companies, and share, (USD Million)

Global On-Site Hydrogen Production revenue by player, revenue and market share 2021-2026, (USD Million)

Global On-Site Hydrogen Production total market by Type, CAGR, 2021-2032, (USD Million)

Global On-Site Hydrogen Production total market by Application, CAGR, 2021-2032, (USD Million)

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This report profiles major players in the global On-Site Hydrogen Production 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 Air Products and Chemicals, Air Liquide, Linde, Nel, Cummins, Plug Power, ITM Power, HyGear, BayoTech, OneH2, 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 On-Site Hydrogen Production 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 On-Site Hydrogen Production Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global On-Site Hydrogen Production Market, Segmentation by Type:

Natural Gas Reforming On-Site Hydrogen Production System

Water Electrolysis On-Site Hydrogen Production System

Methanol Reforming On-Site Hydrogen Production System

Ammonia Cracking On-Site Hydrogen Production System

Others

Global On-Site Hydrogen Production Market, Segmentation by Hydrogen Production Capacity:

Small-Scale System (Up to 100 Nm^3/h)

Medium-Scale System (Above 100 to 1,000 Nm^3/h)

Large-Scale System (Above 1,000 Nm^3/h)

Global On-Site Hydrogen Production Market, Segmentation by Installation Configuration:

Skid-Mounted On-Site Hydrogen Production System

Containerized On-Site Hydrogen Production System

Site-Built On-Site Hydrogen Production Plant

Global On-Site Hydrogen Production Market, Segmentation by Application:

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Chemical and Petrochemical Processing

Metal Heat Treatment and Metallurgy

Electronics and Semiconductor Manufacturing

Glass Manufacturing

Food and Pharmaceutical Processing

Laboratories and Research Institutions

Others

Companies Profiled:

Air Products and Chemicals

Air Liquide

Linde

Nel

Cummins

Plug Power

ITM Power

HyGear

BayoTech

OneH2

Mahler AGS

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Element 1

Hydrogen Onsite

Enapter

John Cockerill

Xi'an LONGi Hydrogen Technology

PERIC Hydrogen Technologies

thyssenkrupp nucera

Siemens Energy

Key Questions Answered

1. How big is the global On-Site Hydrogen Production market?
2. What is the demand of the global On-Site Hydrogen Production market?
3. What is the year over year growth of the global On-Site Hydrogen Production market?
4. What is the total value of the global On-Site Hydrogen Production market?
5. Who are the Major Players in the global On-Site Hydrogen Production market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

2.1 World On-Site Hydrogen Production Consumption Value (2021-2032)
2.2 World On-Site Hydrogen Production Consumption Value by Region
  2.2.1 World On-Site Hydrogen Production Consumption Value by Region (2021-2026)
  2.2.2 World On-Site Hydrogen Production Consumption Value Forecast by Region (2027-2032)
2.3 United States On-Site Hydrogen Production Consumption Value (2021-2032)
2.4 China On-Site Hydrogen Production Consumption Value (2021-2032)
2.5 Europe On-Site Hydrogen Production Consumption Value (2021-2032)
2.6 Japan On-Site Hydrogen Production Consumption Value (2021-2032)
2.7 South Korea On-Site Hydrogen Production Consumption Value (2021-2032)
2.8 ASEAN On-Site Hydrogen Production Consumption Value (2021-2032)
2.9 India On-Site Hydrogen Production Consumption Value (2021-2032)

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3 WORLD ON-SITE HYDROGEN PRODUCTION COMPANIES COMPETITIVE ANALYSIS

3.1 World On-Site Hydrogen Production Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global On-Site Hydrogen Production Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for On-Site Hydrogen Production in 2025
  3.2.3 Global Concentration Ratios (CR8) for On-Site Hydrogen Production in 2025
3.3 On-Site Hydrogen Production Company Evaluation Quadrant
3.4 On-Site Hydrogen Production Market: Overall Company Footprint Analysis
  3.4.1 On-Site Hydrogen Production Market: Region Footprint
  3.4.2 On-Site Hydrogen Production Market: Company Product Type Footprint
  3.4.3 On-Site Hydrogen Production 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: On-Site Hydrogen Production Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: On-Site Hydrogen Production Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: On-Site Hydrogen Production Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: On-Site Hydrogen Production Consumption Value Comparison
  4.2.1 United States VS China: On-Site Hydrogen Production Consumption Value Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: On-Site Hydrogen Production Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based On-Site Hydrogen Production Companies and Market Share, 2021-2026
  4.3.1 United States Based On-Site Hydrogen Production Companies, Headquarters (States, Country)
  4.3.2 United States Based Companies On-Site Hydrogen Production Revenue,

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(2021-2026)
4.4 China Based Companies On-Site Hydrogen Production Revenue and Market Share, 2021-2026
4.4.1 China Based On-Site Hydrogen Production Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies On-Site Hydrogen Production Revenue, (2021-2026)
4.5 Rest of World Based On-Site Hydrogen Production Companies and Market Share, 2021-2026
4.5.1 Rest of World Based On-Site Hydrogen Production Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies On-Site Hydrogen Production Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World On-Site Hydrogen Production Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Natural Gas Reforming On-Site Hydrogen Production System
5.2.2 Water Electrolysis On-Site Hydrogen Production System
5.2.3 Methanol Reforming On-Site Hydrogen Production System
5.2.4 Ammonia Cracking On-Site Hydrogen Production System
5.2.5 Others
5.3 Market Segment by Type
5.3.1 World On-Site Hydrogen Production Market Size by Type (2021-2026)
5.3.2 World On-Site Hydrogen Production Market Size by Type (2027-2032)
5.3.3 World On-Site Hydrogen Production Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY HYDROGEN PRODUCTION CAPACITY

6.1 World On-Site Hydrogen Production Market Size Overview by Hydrogen Production Capacity: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Hydrogen Production Capacity
6.2.1 Small-Scale System (Up to 100 Nm^3/h)
6.2.2 Medium-Scale System (Above 100 to 1,000 Nm^3/h)
6.2.3 Large-Scale System (Above 1,000 Nm^3/h)
6.3 Market Segment by Hydrogen Production Capacity
6.3.1 World On-Site Hydrogen Production Market Size by Hydrogen Production

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info@marketpublishers.com

Capacity (2021-2026)
6.3.2 World On-Site Hydrogen Production Market Size by Hydrogen Production Capacity (2027-2032)
6.3.3 World On-Site Hydrogen Production Market Size Market Share by Hydrogen Production Capacity (2027-2032)

7 MARKET ANALYSIS BY INSTALLATION CONFIGURATION

7.1 World On-Site Hydrogen Production Market Size Overview by Installation Configuration: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Installation Configuration
7.2.1 Skid-Mounted On-Site Hydrogen Production System
7.2.2 Containerized On-Site Hydrogen Production System
7.2.3 Site-Built On-Site Hydrogen Production Plant
7.3 Market Segment by Installation Configuration
7.3.1 World On-Site Hydrogen Production Market Size by Installation Configuration (2021-2026)
7.3.2 World On-Site Hydrogen Production Market Size by Installation Configuration (2027-2032)
7.3.3 World On-Site Hydrogen Production Market Size Market Share by Installation Configuration (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World On-Site Hydrogen Production Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Chemical and Petrochemical Processing
8.2.2 Metal Heat Treatment and Metallurgy
8.2.3 Electronics and Semiconductor Manufacturing
8.2.4 Glass Manufacturing
8.2.5 Food and Pharmaceutical Processing
8.2.6 Laboratories and Research Institutions
8.2.7 Others
8.3 Market Segment by Application
8.3.1 World On-Site Hydrogen Production Market Size by Application (2021-2026)
8.3.2 World On-Site Hydrogen Production Market Size by Application (2027-2032)
8.3.3 World On-Site Hydrogen Production Market Size Market Share by Application (2021-2032)

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9 COMPANY PROFILES

9.1 Air Products and Chemicals
9.1.1 Air Products and Chemicals Details
9.1.2 Air Products and Chemicals Major Business
9.1.3 Air Products and Chemicals On-Site Hydrogen Production Product and Services
9.1.4 Air Products and Chemicals On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 Air Products and Chemicals Recent Developments/Updates
9.1.6 Air Products and Chemicals Competitive Strengths & Weaknesses
9.2 Air Liquide
9.2.1 Air Liquide Details
9.2.2 Air Liquide Major Business
9.2.3 Air Liquide On-Site Hydrogen Production Product and Services
9.2.4 Air Liquide On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 Air Liquide Recent Developments/Updates
9.2.6 Air Liquide Competitive Strengths & Weaknesses
9.3 Linde
9.3.1 Linde Details
9.3.2 Linde Major Business
9.3.3 Linde On-Site Hydrogen Production Product and Services
9.3.4 Linde On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 Linde Recent Developments/Updates
9.3.6 Linde Competitive Strengths & Weaknesses
9.4 Nel
9.4.1 Nel Details
9.4.2 Nel Major Business
9.4.3 Nel On-Site Hydrogen Production Product and Services
9.4.4 Nel On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Nel Recent Developments/Updates
9.4.6 Nel Competitive Strengths & Weaknesses
9.5 Cummins
9.5.1 Cummins Details
9.5.2 Cummins Major Business
9.5.3 Cummins On-Site Hydrogen Production Product and Services

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info@marketpublishers.com

9.5.4 Cummins On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Cummins Recent Developments/Updates
9.5.6 Cummins Competitive Strengths & Weaknesses
9.6 Plug Power
9.6.1 Plug Power Details
9.6.2 Plug Power Major Business
9.6.3 Plug Power On-Site Hydrogen Production Product and Services
9.6.4 Plug Power On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Plug Power Recent Developments/Updates
9.6.6 Plug Power Competitive Strengths & Weaknesses
9.7 ITM Power
9.7.1 ITM Power Details
9.7.2 ITM Power Major Business
9.7.3 ITM Power On-Site Hydrogen Production Product and Services
9.7.4 ITM Power On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 ITM Power Recent Developments/Updates
9.7.6 ITM Power Competitive Strengths & Weaknesses
9.8 HyGear
9.8.1 HyGear Details
9.8.2 HyGear Major Business
9.8.3 HyGear On-Site Hydrogen Production Product and Services
9.8.4 HyGear On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 HyGear Recent Developments/Updates
9.8.6 HyGear Competitive Strengths & Weaknesses
9.9 BayoTech
9.9.1 BayoTech Details
9.9.2 BayoTech Major Business
9.9.3 BayoTech On-Site Hydrogen Production Product and Services
9.9.4 BayoTech On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 BayoTech Recent Developments/Updates
9.9.6 BayoTech Competitive Strengths & Weaknesses
9.10 OneH2
9.10.1 OneH2 Details
9.10.2 OneH2 Major Business

+357 96 030922
info@marketpublishers.com

9.10.3 OneH2 On-Site Hydrogen Production Product and Services
9.10.4 OneH2 On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 OneH2 Recent Developments/Updates
9.10.6 OneH2 Competitive Strengths & Weaknesses
9.11 Mahler AGS
9.11.1 Mahler AGS Details
9.11.2 Mahler AGS Major Business
9.11.3 Mahler AGS On-Site Hydrogen Production Product and Services
9.11.4 Mahler AGS On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Mahler AGS Recent Developments/Updates
9.11.6 Mahler AGS Competitive Strengths & Weaknesses
9.12 Element 1
9.12.1 Element 1 Details
9.12.2 Element 1 Major Business
9.12.3 Element 1 On-Site Hydrogen Production Product and Services
9.12.4 Element 1 On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 Element 1 Recent Developments/Updates
9.12.6 Element 1 Competitive Strengths & Weaknesses
9.13 Hydrogen Onsite
9.13.1 Hydrogen Onsite Details
9.13.2 Hydrogen Onsite Major Business
9.13.3 Hydrogen Onsite On-Site Hydrogen Production Product and Services
9.13.4 Hydrogen Onsite On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 Hydrogen Onsite Recent Developments/Updates
9.13.6 Hydrogen Onsite Competitive Strengths & Weaknesses
9.14 Enapter
9.14.1 Enapter Details
9.14.2 Enapter Major Business
9.14.3 Enapter On-Site Hydrogen Production Product and Services
9.14.4 Enapter On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 Enapter Recent Developments/Updates
9.14.6 Enapter Competitive Strengths & Weaknesses
9.15 John Cockerill
9.15.1 John Cockerill Details

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9.15.2 John Cockerill Major Business
9.15.3 John Cockerill On-Site Hydrogen Production Product and Services
9.15.4 John Cockerill On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 John Cockerill Recent Developments/Updates
9.15.6 John Cockerill Competitive Strengths & Weaknesses
9.16 Xi'an LONGi Hydrogen Technology
9.16.1 Xi'an LONGi Hydrogen Technology Details
9.16.2 Xi'an LONGi Hydrogen Technology Major Business
9.16.3 Xi'an LONGi Hydrogen Technology On-Site Hydrogen Production Product and Services
9.16.4 Xi'an LONGi Hydrogen Technology On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Xi'an LONGi Hydrogen Technology Recent Developments/Updates
9.16.6 Xi'an LONGi Hydrogen Technology Competitive Strengths & Weaknesses
9.17 PERIC Hydrogen Technologies
9.17.1 PERIC Hydrogen Technologies Details
9.17.2 PERIC Hydrogen Technologies Major Business
9.17.3 PERIC Hydrogen Technologies On-Site Hydrogen Production Product and Services
9.17.4 PERIC Hydrogen Technologies On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.17.5 PERIC Hydrogen Technologies Recent Developments/Updates
9.17.6 PERIC Hydrogen Technologies Competitive Strengths & Weaknesses
9.18 thyssenkrupp nucera
9.18.1 thyssenkrupp nucera Details
9.18.2 thyssenkrupp nucera Major Business
9.18.3 thyssenkrupp nucera On-Site Hydrogen Production Product and Services
9.18.4 thyssenkrupp nucera On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 thyssenkrupp nucera Recent Developments/Updates
9.18.6 thyssenkrupp nucera Competitive Strengths & Weaknesses
9.19 Siemens Energy
9.19.1 Siemens Energy Details
9.19.2 Siemens Energy Major Business
9.19.3 Siemens Energy On-Site Hydrogen Production Product and Services
9.19.4 Siemens Energy On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026)
9.19.5 Siemens Energy Recent Developments/Updates

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9.19.6 Siemens Energy Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 On-Site Hydrogen Production Industry Chain
10.2 On-Site Hydrogen Production Upstream Analysis
10.3 On-Site Hydrogen Production Midstream Analysis
10.4 On-Site Hydrogen Production Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World On-Site Hydrogen Production Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World On-Site Hydrogen Production Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World On-Site Hydrogen Production Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World On-Site Hydrogen Production Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World On-Site Hydrogen Production Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World On-Site Hydrogen Production Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World On-Site Hydrogen Production Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World On-Site Hydrogen Production Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World On-Site Hydrogen Production Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key On-Site Hydrogen Production Players in 2025
Table 12. World On-Site Hydrogen Production Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global On-Site Hydrogen Production Company Evaluation Quadrant
Table 14. Head Office of Key On-Site Hydrogen Production Players
Table 15. On-Site Hydrogen Production Market: Company Product Type Footprint
Table 16. On-Site Hydrogen Production Market: Company Product Application Footprint
Table 17. On-Site Hydrogen Production Mergers & Acquisitions Activity
Table 18. United States VS China On-Site Hydrogen Production Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China On-Site Hydrogen Production Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based On-Site Hydrogen Production Companies, Headquarters (States, Country)
Table 21. United States Based Companies On-Site Hydrogen Production Revenue, (2021-2026) & (USD Million)

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Table 22. United States Based Companies On-Site Hydrogen Production Revenue Market Share (2021-2026)
Table 23. China Based On-Site Hydrogen Production Companies, Headquarters (Province, Country)
Table 24. China Based Companies On-Site Hydrogen Production Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies On-Site Hydrogen Production Revenue Market Share (2021-2026)
Table 26. Rest of World Based On-Site Hydrogen Production Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies On-Site Hydrogen Production Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies On-Site Hydrogen Production Revenue Market Share (2021-2026)
Table 29. World On-Site Hydrogen Production Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World On-Site Hydrogen Production Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World On-Site Hydrogen Production Market Size by Type (2027-2032) & (USD Million)
Table 32. World On-Site Hydrogen Production Market Size by Hydrogen Production Capacity, (USD Million), 2021 & 2025 & 2032
Table 33. World On-Site Hydrogen Production Market Size Value by Hydrogen Production Capacity (2021-2026) & (USD Million)
Table 34. World On-Site Hydrogen Production Market Size by Hydrogen Production Capacity (2027-2032) & (USD Million)
Table 35. World On-Site Hydrogen Production Market Size by Installation Configuration, (USD Million), 2021 & 2025 & 2032
Table 36. World On-Site Hydrogen Production Market Size Value by Installation Configuration (2021-2026) & (USD Million)
Table 37. World On-Site Hydrogen Production Market Size by Installation Configuration (2027-2032) & (USD Million)
Table 38. World On-Site Hydrogen Production Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World On-Site Hydrogen Production Market Size by Application (2021-2026) & (USD Million)
Table 40. World On-Site Hydrogen Production Market Size by Application (2027-2032) & (USD Million)
Table 41. Air Products and Chemicals Basic Information, Manufacturing Base and

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Competitors
Table 42. Air Products and Chemicals Major Business
Table 43. Air Products and Chemicals On-Site Hydrogen Production Product and Services
Table 44. Air Products and Chemicals On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Air Products and Chemicals Recent Developments/Updates
Table 46. Air Products and Chemicals Competitive Strengths & Weaknesses
Table 47. Air Liquide Basic Information, Manufacturing Base and Competitors
Table 48. Air Liquide Major Business
Table 49. Air Liquide On-Site Hydrogen Production Product and Services
Table 50. Air Liquide On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Air Liquide Recent Developments/Updates
Table 52. Air Liquide Competitive Strengths & Weaknesses
Table 53. Linde Basic Information, Manufacturing Base and Competitors
Table 54. Linde Major Business
Table 55. Linde On-Site Hydrogen Production Product and Services
Table 56. Linde On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Linde Recent Developments/Updates
Table 58. Linde Competitive Strengths & Weaknesses
Table 59. Nel Basic Information, Manufacturing Base and Competitors
Table 60. Nel Major Business
Table 61. Nel On-Site Hydrogen Production Product and Services
Table 62. Nel On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Nel Recent Developments/Updates
Table 64. Nel Competitive Strengths & Weaknesses
Table 65. Cummins Basic Information, Manufacturing Base and Competitors
Table 66. Cummins Major Business
Table 67. Cummins On-Site Hydrogen Production Product and Services
Table 68. Cummins On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Cummins Recent Developments/Updates
Table 70. Cummins Competitive Strengths & Weaknesses
Table 71. Plug Power Basic Information, Manufacturing Base and Competitors
Table 72. Plug Power Major Business
Table 73. Plug Power On-Site Hydrogen Production Product and Services

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Table 74. Plug Power On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Plug Power Recent Developments/Updates
Table 76. Plug Power Competitive Strengths & Weaknesses
Table 77. ITM Power Basic Information, Manufacturing Base and Competitors
Table 78. ITM Power Major Business
Table 79. ITM Power On-Site Hydrogen Production Product and Services
Table 80. ITM Power On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. ITM Power Recent Developments/Updates
Table 82. ITM Power Competitive Strengths & Weaknesses
Table 83. HyGear Basic Information, Manufacturing Base and Competitors
Table 84. HyGear Major Business
Table 85. HyGear On-Site Hydrogen Production Product and Services
Table 86. HyGear On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. HyGear Recent Developments/Updates
Table 88. HyGear Competitive Strengths & Weaknesses
Table 89. BayoTech Basic Information, Manufacturing Base and Competitors
Table 90. BayoTech Major Business
Table 91. BayoTech On-Site Hydrogen Production Product and Services
Table 92. BayoTech On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. BayoTech Recent Developments/Updates
Table 94. BayoTech Competitive Strengths & Weaknesses
Table 95. OneH2 Basic Information, Manufacturing Base and Competitors
Table 96. OneH2 Major Business
Table 97. OneH2 On-Site Hydrogen Production Product and Services
Table 98. OneH2 On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. OneH2 Recent Developments/Updates
Table 100. OneH2 Competitive Strengths & Weaknesses
Table 101. Mahler AGS Basic Information, Manufacturing Base and Competitors
Table 102. Mahler AGS Major Business
Table 103. Mahler AGS On-Site Hydrogen Production Product and Services
Table 104. Mahler AGS On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Mahler AGS Recent Developments/Updates
Table 106. Mahler AGS Competitive Strengths & Weaknesses

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Table 107. Element 1 Basic Information, Manufacturing Base and Competitors
Table 108. Element 1 Major Business
Table 109. Element 1 On-Site Hydrogen Production Product and Services
Table 110. Element 1 On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Element 1 Recent Developments/Updates
Table 112. Element 1 Competitive Strengths & Weaknesses
Table 113. Hydrogen Onsite Basic Information, Manufacturing Base and Competitors
Table 114. Hydrogen Onsite Major Business
Table 115. Hydrogen Onsite On-Site Hydrogen Production Product and Services
Table 116. Hydrogen Onsite On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Hydrogen Onsite Recent Developments/Updates
Table 118. Hydrogen Onsite Competitive Strengths & Weaknesses
Table 119. Enapter Basic Information, Manufacturing Base and Competitors
Table 120. Enapter Major Business
Table 121. Enapter On-Site Hydrogen Production Product and Services
Table 122. Enapter On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Enapter Recent Developments/Updates
Table 124. Enapter Competitive Strengths & Weaknesses
Table 125. John Cockerill Basic Information, Manufacturing Base and Competitors
Table 126. John Cockerill Major Business
Table 127. John Cockerill On-Site Hydrogen Production Product and Services
Table 128. John Cockerill On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. John Cockerill Recent Developments/Updates
Table 130. John Cockerill Competitive Strengths & Weaknesses
Table 131. Xi'an LONGi Hydrogen Technology Basic Information, Manufacturing Base and Competitors
Table 132. Xi'an LONGi Hydrogen Technology Major Business
Table 133. Xi'an LONGi Hydrogen Technology On-Site Hydrogen Production Product and Services
Table 134. Xi'an LONGi Hydrogen Technology On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Xi'an LONGi Hydrogen Technology Recent Developments/Updates
Table 136. Xi'an LONGi Hydrogen Technology Competitive Strengths & Weaknesses
Table 137. PERIC Hydrogen Technologies Basic Information, Manufacturing Base and Competitors

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Table 138. PERIC Hydrogen Technologies Major Business
Table 139. PERIC Hydrogen Technologies On-Site Hydrogen Production Product and Services
Table 140. PERIC Hydrogen Technologies On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. PERIC Hydrogen Technologies Recent Developments/Updates
Table 142. PERIC Hydrogen Technologies Competitive Strengths & Weaknesses
Table 143. thyssenkrupp nucera Basic Information, Manufacturing Base and Competitors
Table 144. thyssenkrupp nucera Major Business
Table 145. thyssenkrupp nucera On-Site Hydrogen Production Product and Services
Table 146. thyssenkrupp nucera On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. thyssenkrupp nucera Recent Developments/Updates
Table 148. thyssenkrupp nucera Competitive Strengths & Weaknesses
Table 149. Siemens Energy Basic Information, Manufacturing Base and Competitors
Table 150. Siemens Energy Major Business
Table 151. Siemens Energy On-Site Hydrogen Production Product and Services
Table 152. Siemens Energy On-Site Hydrogen Production Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. Siemens Energy Recent Developments/Updates
Table 154. Siemens Energy Competitive Strengths & Weaknesses
Table 155. Global Key Players of On-Site Hydrogen Production Upstream (Raw Materials)
Table 156. Global On-Site Hydrogen Production Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. On-Site Hydrogen Production Picture
Figure 2. World On-Site Hydrogen Production Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World On-Site Hydrogen Production Total Revenue (2021-2032) & (USD Million)
Figure 4. World On-Site Hydrogen Production Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World On-Site Hydrogen Production Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company On-Site Hydrogen Production Revenue (2021-2032) & (USD Million)
Figure 13. On-Site Hydrogen Production Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 16. World On-Site Hydrogen Production Consumption Value Market Share by Region (2021-2032)
Figure 17. United States On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 18. China On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 23. India On-Site Hydrogen Production Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of On-Site Hydrogen Production by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for On-Site Hydrogen Production Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for On-Site Hydrogen Production Markets in 2025
Figure 27. United States VS China: On-Site Hydrogen Production Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: On-Site Hydrogen Production Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World On-Site Hydrogen Production Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World On-Site Hydrogen Production Market Size Market Share by Type in 2025
Figure 31. Natural Gas Reforming On-Site Hydrogen Production System
Figure 32. Water Electrolysis On-Site Hydrogen Production System
Figure 33. Methanol Reforming On-Site Hydrogen Production System
Figure 34. Ammonia Cracking On-Site Hydrogen Production System
Figure 35. Others
Figure 36. World On-Site Hydrogen Production Market Size Market Share by Type (2021-2032)
Figure 37. World On-Site Hydrogen Production Market Size by Hydrogen Production Capacity, (USD Million), 2021 & 2025 & 2032
Figure 38. World On-Site Hydrogen Production Market Size Market Share by Hydrogen Production Capacity in 2025
Figure 39. Small-Scale System (Up to 100 Nm³/h)
Figure 40. Medium-Scale System (Above 100 to 1,000 Nm³/h)
Figure 41. Large-Scale System (Above 1,000 Nm³/h)
Figure 42. World On-Site Hydrogen Production Market Size Market Share by Hydrogen Production Capacity (2021-2032)
Figure 43. World On-Site Hydrogen Production Market Size by Installation

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Configuration, (USD Million), 2021 & 2025 & 2032
Figure 44. World On-Site Hydrogen Production Market Size Market Share by Installation Configuration in 2025
Figure 45. Skid-Mounted On-Site Hydrogen Production System
Figure 46. Containerized On-Site Hydrogen Production System
Figure 47. Site-Built On-Site Hydrogen Production Plant
Figure 48. World On-Site Hydrogen Production Market Size Market Share by Installation Configuration (2021-2032)
Figure 49. World On-Site Hydrogen Production Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 50. World On-Site Hydrogen Production Market Size Market Share by Application in 2025
Figure 51. Chemical and Petrochemical Processing
Figure 52. Metal Heat Treatment and Metallurgy
Figure 53. Electronics and Semiconductor Manufacturing
Figure 54. Glass Manufacturing
Figure 55. Food and Pharmaceutical Processing
Figure 56. Laboratories and Research Institutions
Figure 57. Others
Figure 58. World On-Site Hydrogen Production Market Size Market Share by Application (2021-2032)
Figure 59. On-Site Hydrogen Production Industrial Chain
Figure 60. Methodology
Figure 61. Research Process and Data Source

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