

# Global PEM Hydrogen Electrolyzer Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global PEM Hydrogen Electrolyzer market size is expected to reach \$ 4351 million by 2032, rising at a market growth of 43.9% CAGR during the forecast period (2026-2032).

In 2025, global PEM Hydrogen Electrolyzer production reached approximately 6,566 units with an average global market price of around k US\$50 per unit. Single-line annual production capacity averages 200 units with a gross margin of approximately 25-30%. The upstream core of the PEM electrolyzer for hydrogen production is concentrated in the high-performance materials sector, encompassing the research, development, and manufacturing of specialized materials such as noble metal catalysts (platinum and iridium), perfluorosulfonic acid proton exchange membranes, titanium fiber diffusion layers, and precision titanium bipolar plates. The midstream primarily involves stack assembly and system integration. In downstream applications, hydrogen production from wind and solar accounts for approximately 45%, chemical and oil refining industries for 25%, hydrogen refueling stations for 15%, metallurgy and iron and steel for 8%, while power electronics and other sectors collectively account for 7%. Current demand is primarily driven by global carbon neutrality policies and the grid parity of renewable energy, focusing on high-pressure, high-efficiency electrolysis systems capable of matching the fluctuating characteristics of wind and solar power, achieving rapid start-stop and wide-load regulation, thereby supporting continuous and stable green hydrogen supply in industrial sectors. The core commercial opportunity lies in overcoming the mass production technological barriers of low-iridium catalysts and ultra-thin composite proton exchange membranes to reduce material costs, while developing intelligent coordination control systems and combined heat and power solutions adaptable to high-proportion intermittent power sources. Emphasis is placed on establishing commercially viable demonstration projects in scenarios such as green

chemical synthesis, hydrogen-based iron and steel smelting, and distributed energy networks in regions abundant in renewable energy resources.

The PEM electrolyzer utilizes a solid polymer electrolyte membrane that selectively conducts protons to directly split water into high-purity hydrogen and oxygen through an electrochemical reaction. Its compact, zero-gap cell design enables operation at high current densities and under dynamic load conditions, making it particularly suited to convert intermittent renewable electricity into hydrogen with rapid response and high efficiency. By operating at elevated pressures and minimizing gas crossover, the system reduces downstream compression needs and ensures gas purity, while advanced catalyst layers and durable materials enhance longevity under variable power input. This technology bridges electrical energy from renewables and chemical energy carriers, offering scalable, on-demand hydrogen production with minimal ancillary balancing components.

The PEM hydrogen electrolyzer industry is transitioning from technological demonstration to large-scale expansion, with its development trajectory clearly reflected across several dimensions. Technologically, breakthroughs in low-iridium catalysts, composite proton exchange membranes, and high-pressure integrated systems are driving electrolysis efficiency toward levels exceeding 80%, while extending equipment lifespans beyond a decade. Material costs continue to decline due to accelerating domestic production. In terms of application scenarios, PEM electrolyzers serve not only as 'balancers' for intermittent renewable energy sources like wind and solar but also as core enablers for deep industrial decarbonization in areas such as hydrogen-based steelmaking and green ammonia/methanol synthesis, particularly demonstrating flexibility in off-grid hydrogen production and industrial park-level hydrogen microgrids. Commercially, the industry is shifting from equipment sales to operational services, with financial instruments and carbon constraint policies further accelerating project implementation. The industry's future growth momentum ultimately depends on the pace of declining green electricity costs, the development of cross-regional hydrogen transportation infrastructure, and the synergistic cost-reduction capabilities across the entire value chain?from materials to integrated systems.

This report studies the global PEM Hydrogen Electrolyzer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PEM Hydrogen Electrolyzer 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 PEM Hydrogen Electrolyzer that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global PEM Hydrogen Electrolyzer total production and demand, 2021-2032, (Units)

Global PEM Hydrogen Electrolyzer total production value, 2021-2032, (USD Million)

Global PEM Hydrogen Electrolyzer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global PEM Hydrogen Electrolyzer consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: PEM Hydrogen Electrolyzer domestic production, consumption, key domestic manufacturers and share

Global PEM Hydrogen Electrolyzer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global PEM Hydrogen Electrolyzer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global PEM Hydrogen Electrolyzer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global PEM Hydrogen Electrolyzer 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 Proton Onsite (Nel Hydrogen), Accelera, Cummins, Elogen, ITM Power, IMI, H-TEC SYSTEMS, Toshiba, Kobelco Eco-Solutions, Siemens, 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 PEM Hydrogen Electrolyzer market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 PEM Hydrogen Electrolyzer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global PEM Hydrogen Electrolyzer Market, Segmentation by Type:

Small Type

Medium Type

Large Type

## Global PEM Hydrogen Electrolyzer Market, Segmentation by Form:

Modular Platform

Containerized Platform

## Global PEM Hydrogen Electrolyzer Market, Segmentation by Design:

Plug & Play

Others

### Global PEM Hydrogen Electrolyzer Market, Segmentation by Application:

Power to Gas

Chemical & Refining

Metallurgy & Steel

Hydrogen Refueling Station

Power

Electronics & Semiconductor

Others

### Companies Profiled:

Proton Onsite (Nel Hydrogen)

Accelera

Cummins

Elogen

ITM Power

IMI

H-TEC SYSTEMS

Toshiba

Kobelco Eco-Solutions

Siemens

Kyros Hydrogen Solutions

Hystar

Plug Power

Quest One

Elchemtech

H2B2

Beijing Sany Heavy Industry

Guangdong Cawolo Hydrogen Technology

Shanghai Kinghet

Guangdong Qingneng Ruilong New Energy Technology

Changchun Green Drive Hydrogen Technology

Shandong Saikesaisi Hydrogen Energy

Huizhou EVE Hydrogen Energy

Hefei Sungrow

Amoy Island Hydrogen (Xiamen) Technology

BriHyNergy (Shenzhen)

718th Research Institute of CSIC

**Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 PEM Hydrogen Electrolyzer Introduction
- 1.2 World PEM Hydrogen Electrolyzer Supply & Forecast
  - 1.2.1 World PEM Hydrogen Electrolyzer Production Value (2021 & 2025 & 2032)
  - 1.2.2 World PEM Hydrogen Electrolyzer Production (2021-2032)
  - 1.2.3 World PEM Hydrogen Electrolyzer Pricing Trends (2021-2032)
- 1.3 World PEM Hydrogen Electrolyzer Production by Region (Based on Production Site)
  - 1.3.1 World PEM Hydrogen Electrolyzer Production Value by Region (2021-2032)
  - 1.3.2 World PEM Hydrogen Electrolyzer Production by Region (2021-2032)
  - 1.3.3 World PEM Hydrogen Electrolyzer Average Price by Region (2021-2032)
  - 1.3.4 North America PEM Hydrogen Electrolyzer Production (2021-2032)
  - 1.3.5 Europe PEM Hydrogen Electrolyzer Production (2021-2032)
  - 1.3.6 China PEM Hydrogen Electrolyzer Production (2021-2032)
  - 1.3.7 Japan PEM Hydrogen Electrolyzer Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 PEM Hydrogen Electrolyzer Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 PEM Hydrogen Electrolyzer Major Market Trends

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World PEM Hydrogen Electrolyzer Production Value by Manufacturer (2021-2026)
- 3.2 World PEM Hydrogen Electrolyzer Production by Manufacturer (2021-2026)
- 3.3 World PEM Hydrogen Electrolyzer Average Price by Manufacturer (2021-2026)
- 3.4 PEM Hydrogen Electrolyzer Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global PEM Hydrogen Electrolyzer Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for PEM Hydrogen Electrolyzer in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for PEM Hydrogen Electrolyzer in 2025
- 3.6 PEM Hydrogen Electrolyzer Market: Overall Company Footprint Analysis
  - 3.6.1 PEM Hydrogen Electrolyzer Market: Region Footprint
  - 3.6.2 PEM Hydrogen Electrolyzer Market: Company Product Type Footprint
  - 3.6.3 PEM Hydrogen Electrolyzer Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: PEM Hydrogen Electrolyzer Production Value Comparison
  - 4.1.1 United States VS China: PEM Hydrogen Electrolyzer Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: PEM Hydrogen Electrolyzer Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: PEM Hydrogen Electrolyzer Production Comparison
  - 4.2.1 United States VS China: PEM Hydrogen Electrolyzer Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: PEM Hydrogen Electrolyzer Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: PEM Hydrogen Electrolyzer Consumption Comparison
  - 4.3.1 United States VS China: PEM Hydrogen Electrolyzer Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: PEM Hydrogen Electrolyzer Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based PEM Hydrogen Electrolyzer Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based PEM Hydrogen Electrolyzer Manufacturers, Headquarters

and Production Site (States, Country)

4.4.2 United States Based Manufacturers PEM Hydrogen Electrolyzer Production Value (2021-2026)

4.4.3 United States Based Manufacturers PEM Hydrogen Electrolyzer Production (2021-2026)

4.5 China Based PEM Hydrogen Electrolyzer Manufacturers and Market Share

4.5.1 China Based PEM Hydrogen Electrolyzer Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers PEM Hydrogen Electrolyzer Production Value (2021-2026)

4.5.3 China Based Manufacturers PEM Hydrogen Electrolyzer Production (2021-2026)

4.6 Rest of World Based PEM Hydrogen Electrolyzer Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based PEM Hydrogen Electrolyzer Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World PEM Hydrogen Electrolyzer Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Small Type

5.2.2 Medium Type

5.2.3 Large Type

5.3 Market Segment by Type

5.3.1 World PEM Hydrogen Electrolyzer Production by Type (2021-2032)

5.3.2 World PEM Hydrogen Electrolyzer Production Value by Type (2021-2032)

5.3.3 World PEM Hydrogen Electrolyzer Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY FORM**

6.1 World PEM Hydrogen Electrolyzer Market Size Overview by Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Form

6.2.1 Modular Platform

6.2.2 Containerized Platform

6.3 Market Segment by Form

6.3.1 World PEM Hydrogen Electrolyzer Production by Form (2021-2032)

6.3.2 World PEM Hydrogen Electrolyzer Production Value by Form (2021-2032)

6.3.3 World PEM Hydrogen Electrolyzer Average Price by Form (2021-2032)

## **7 MARKET ANALYSIS BY DESIGN**

7.1 World PEM Hydrogen Electrolyzer Market Size Overview by Design: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Design

7.2.1 Plug & Play

7.2.2 Others

7.3 Market Segment by Design

7.3.1 World PEM Hydrogen Electrolyzer Production by Design (2021-2032)

7.3.2 World PEM Hydrogen Electrolyzer Production Value by Design (2021-2032)

7.3.3 World PEM Hydrogen Electrolyzer Average Price by Design (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World PEM Hydrogen Electrolyzer Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Power to Gas

8.2.2 Chemical & Refining

8.2.3 Metallurgy & Steel

8.2.4 Hydrogen Refueling Station

8.2.5 Power

8.2.6 Electronics & Semiconductor

8.2.7 Others

8.3 Market Segment by Application

8.3.1 World PEM Hydrogen Electrolyzer Production by Application (2021-2032)

8.3.2 World PEM Hydrogen Electrolyzer Production Value by Application (2021-2032)

8.3.3 World PEM Hydrogen Electrolyzer Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Proton Onsite (Nel Hydrogen)

9.1.1 Proton Onsite (Nel Hydrogen) Details

- 9.1.2 Proton Onsite (Nel Hydrogen) Major Business
- 9.1.3 Proton Onsite (Nel Hydrogen) PEM Hydrogen Electrolyzer Product and Services
- 9.1.4 Proton Onsite (Nel Hydrogen) PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Proton Onsite (Nel Hydrogen) Recent Developments/Updates
- 9.1.6 Proton Onsite (Nel Hydrogen) Competitive Strengths & Weaknesses
- 9.2 Accelera
  - 9.2.1 Accelera Details
  - 9.2.2 Accelera Major Business
  - 9.2.3 Accelera PEM Hydrogen Electrolyzer Product and Services
  - 9.2.4 Accelera PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.2.5 Accelera Recent Developments/Updates
  - 9.2.6 Accelera Competitive Strengths & Weaknesses
- 9.3 Cummins
  - 9.3.1 Cummins Details
  - 9.3.2 Cummins Major Business
  - 9.3.3 Cummins PEM Hydrogen Electrolyzer Product and Services
  - 9.3.4 Cummins PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Cummins Recent Developments/Updates
  - 9.3.6 Cummins Competitive Strengths & Weaknesses
- 9.4 Elogen
  - 9.4.1 Elogen Details
  - 9.4.2 Elogen Major Business
  - 9.4.3 Elogen PEM Hydrogen Electrolyzer Product and Services
  - 9.4.4 Elogen PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 Elogen Recent Developments/Updates
  - 9.4.6 Elogen Competitive Strengths & Weaknesses
- 9.5 ITM Power
  - 9.5.1 ITM Power Details
  - 9.5.2 ITM Power Major Business
  - 9.5.3 ITM Power PEM Hydrogen Electrolyzer Product and Services
  - 9.5.4 ITM Power PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 ITM Power Recent Developments/Updates
  - 9.5.6 ITM Power Competitive Strengths & Weaknesses
- 9.6 IMI

- 9.6.1 IMI Details
- 9.6.2 IMI Major Business
- 9.6.3 IMI PEM Hydrogen Electrolyzer Product and Services
- 9.6.4 IMI PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 IMI Recent Developments/Updates
- 9.6.6 IMI Competitive Strengths & Weaknesses
- 9.7 H-TEC SYSTEMS
  - 9.7.1 H-TEC SYSTEMS Details
  - 9.7.2 H-TEC SYSTEMS Major Business
  - 9.7.3 H-TEC SYSTEMS PEM Hydrogen Electrolyzer Product and Services
  - 9.7.4 H-TEC SYSTEMS PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 H-TEC SYSTEMS Recent Developments/Updates
  - 9.7.6 H-TEC SYSTEMS Competitive Strengths & Weaknesses
- 9.8 Toshiba
  - 9.8.1 Toshiba Details
  - 9.8.2 Toshiba Major Business
  - 9.8.3 Toshiba PEM Hydrogen Electrolyzer Product and Services
  - 9.8.4 Toshiba PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Toshiba Recent Developments/Updates
  - 9.8.6 Toshiba Competitive Strengths & Weaknesses
- 9.9 Kobelco Eco-Solutions
  - 9.9.1 Kobelco Eco-Solutions Details
  - 9.9.2 Kobelco Eco-Solutions Major Business
  - 9.9.3 Kobelco Eco-Solutions PEM Hydrogen Electrolyzer Product and Services
  - 9.9.4 Kobelco Eco-Solutions PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Kobelco Eco-Solutions Recent Developments/Updates
  - 9.9.6 Kobelco Eco-Solutions Competitive Strengths & Weaknesses
- 9.10 Siemens
  - 9.10.1 Siemens Details
  - 9.10.2 Siemens Major Business
  - 9.10.3 Siemens PEM Hydrogen Electrolyzer Product and Services
  - 9.10.4 Siemens PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 Siemens Recent Developments/Updates
  - 9.10.6 Siemens Competitive Strengths & Weaknesses

## 9.11 Kyros Hydrogen Solutions

9.11.1 Kyros Hydrogen Solutions Details

9.11.2 Kyros Hydrogen Solutions Major Business

9.11.3 Kyros Hydrogen Solutions PEM Hydrogen Electrolyzer Product and Services

9.11.4 Kyros Hydrogen Solutions PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Kyros Hydrogen Solutions Recent Developments/Updates

9.11.6 Kyros Hydrogen Solutions Competitive Strengths & Weaknesses

## 9.12 Hystar

9.12.1 Hystar Details

9.12.2 Hystar Major Business

9.12.3 Hystar PEM Hydrogen Electrolyzer Product and Services

9.12.4 Hystar PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Hystar Recent Developments/Updates

9.12.6 Hystar Competitive Strengths & Weaknesses

## 9.13 Plug Power

9.13.1 Plug Power Details

9.13.2 Plug Power Major Business

9.13.3 Plug Power PEM Hydrogen Electrolyzer Product and Services

9.13.4 Plug Power PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Plug Power Recent Developments/Updates

9.13.6 Plug Power Competitive Strengths & Weaknesses

## 9.14 Quest One

9.14.1 Quest One Details

9.14.2 Quest One Major Business

9.14.3 Quest One PEM Hydrogen Electrolyzer Product and Services

9.14.4 Quest One PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Quest One Recent Developments/Updates

9.14.6 Quest One Competitive Strengths & Weaknesses

## 9.15 Elchemtech

9.15.1 Elchemtech Details

9.15.2 Elchemtech Major Business

9.15.3 Elchemtech PEM Hydrogen Electrolyzer Product and Services

9.15.4 Elchemtech PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Elchemtech Recent Developments/Updates

- 9.15.6 Elchemtech Competitive Strengths & Weaknesses
- 9.16 H2B2
  - 9.16.1 H2B2 Details
  - 9.16.2 H2B2 Major Business
  - 9.16.3 H2B2 PEM Hydrogen Electrolyzer Product and Services
  - 9.16.4 H2B2 PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.16.5 H2B2 Recent Developments/Updates
  - 9.16.6 H2B2 Competitive Strengths & Weaknesses
- 9.17 Beijing Sany Heavy Industry
  - 9.17.1 Beijing Sany Heavy Industry Details
  - 9.17.2 Beijing Sany Heavy Industry Major Business
  - 9.17.3 Beijing Sany Heavy Industry PEM Hydrogen Electrolyzer Product and Services
  - 9.17.4 Beijing Sany Heavy Industry PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.17.5 Beijing Sany Heavy Industry Recent Developments/Updates
  - 9.17.6 Beijing Sany Heavy Industry Competitive Strengths & Weaknesses
- 9.18 Guangdong Cawolo Hydrogen Technology
  - 9.18.1 Guangdong Cawolo Hydrogen Technology Details
  - 9.18.2 Guangdong Cawolo Hydrogen Technology Major Business
  - 9.18.3 Guangdong Cawolo Hydrogen Technology PEM Hydrogen Electrolyzer Product and Services
  - 9.18.4 Guangdong Cawolo Hydrogen Technology PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 Guangdong Cawolo Hydrogen Technology Recent Developments/Updates
  - 9.18.6 Guangdong Cawolo Hydrogen Technology Competitive Strengths & Weaknesses
- 9.19 Shanghai Kinghet
  - 9.19.1 Shanghai Kinghet Details
  - 9.19.2 Shanghai Kinghet Major Business
  - 9.19.3 Shanghai Kinghet PEM Hydrogen Electrolyzer Product and Services
  - 9.19.4 Shanghai Kinghet PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.19.5 Shanghai Kinghet Recent Developments/Updates
  - 9.19.6 Shanghai Kinghet Competitive Strengths & Weaknesses
- 9.20 Guangdong Qingneng Ruilong New Energy Technology
  - 9.20.1 Guangdong Qingneng Ruilong New Energy Technology Details
  - 9.20.2 Guangdong Qingneng Ruilong New Energy Technology Major Business
  - 9.20.3 Guangdong Qingneng Ruilong New Energy Technology PEM Hydrogen

## Electrolyzer Product and Services

9.20.4 Guangdong Qingneng Ruilong New Energy Technology PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Guangdong Qingneng Ruilong New Energy Technology Recent Developments/Updates

9.20.6 Guangdong Qingneng Ruilong New Energy Technology Competitive Strengths & Weaknesses

## 9.21 Changchun Green Drive Hydrogen Technology

9.21.1 Changchun Green Drive Hydrogen Technology Details

9.21.2 Changchun Green Drive Hydrogen Technology Major Business

9.21.3 Changchun Green Drive Hydrogen Technology PEM Hydrogen Electrolyzer Product and Services

9.21.4 Changchun Green Drive Hydrogen Technology PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 Changchun Green Drive Hydrogen Technology Recent Developments/Updates

9.21.6 Changchun Green Drive Hydrogen Technology Competitive Strengths & Weaknesses

## 9.22 Shandong Saikesaisi Hydrogen Energy

9.22.1 Shandong Saikesaisi Hydrogen Energy Details

9.22.2 Shandong Saikesaisi Hydrogen Energy Major Business

9.22.3 Shandong Saikesaisi Hydrogen Energy PEM Hydrogen Electrolyzer Product and Services

9.22.4 Shandong Saikesaisi Hydrogen Energy PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.22.5 Shandong Saikesaisi Hydrogen Energy Recent Developments/Updates

9.22.6 Shandong Saikesaisi Hydrogen Energy Competitive Strengths & Weaknesses

## 9.23 Huizhou EVE Hydrogen Energy

9.23.1 Huizhou EVE Hydrogen Energy Details

9.23.2 Huizhou EVE Hydrogen Energy Major Business

9.23.3 Huizhou EVE Hydrogen Energy PEM Hydrogen Electrolyzer Product and Services

9.23.4 Huizhou EVE Hydrogen Energy PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.23.5 Huizhou EVE Hydrogen Energy Recent Developments/Updates

9.23.6 Huizhou EVE Hydrogen Energy Competitive Strengths & Weaknesses

## 9.24 Hefei Sungrow

9.24.1 Hefei Sungrow Details

9.24.2 Hefei Sungrow Major Business

9.24.3 Hefei Sungrow PEM Hydrogen Electrolyzer Product and Services

- 9.24.4 Hefei Sungrow PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.24.5 Hefei Sungrow Recent Developments/Updates
- 9.24.6 Hefei Sungrow Competitive Strengths & Weaknesses
- 9.25 Amoy Island Hydrogen (Xiamen) Technology
  - 9.25.1 Amoy Island Hydrogen (Xiamen) Technology Details
  - 9.25.2 Amoy Island Hydrogen (Xiamen) Technology Major Business
  - 9.25.3 Amoy Island Hydrogen (Xiamen) Technology PEM Hydrogen Electrolyzer Product and Services
  - 9.25.4 Amoy Island Hydrogen (Xiamen) Technology PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.25.5 Amoy Island Hydrogen (Xiamen) Technology Recent Developments/Updates
  - 9.25.6 Amoy Island Hydrogen (Xiamen) Technology Competitive Strengths & Weaknesses
- 9.26 BriHyNergy (Shenzhen)
  - 9.26.1 BriHyNergy (Shenzhen) Details
  - 9.26.2 BriHyNergy (Shenzhen) Major Business
  - 9.26.3 BriHyNergy (Shenzhen) PEM Hydrogen Electrolyzer Product and Services
  - 9.26.4 BriHyNergy (Shenzhen) PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.26.5 BriHyNergy (Shenzhen) Recent Developments/Updates
  - 9.26.6 BriHyNergy (Shenzhen) Competitive Strengths & Weaknesses
- 9.27 718th Research Institute of CSIC
  - 9.27.1 718th Research Institute of CSIC Details
  - 9.27.2 718th Research Institute of CSIC Major Business
  - 9.27.3 718th Research Institute of CSIC PEM Hydrogen Electrolyzer Product and Services
  - 9.27.4 718th Research Institute of CSIC PEM Hydrogen Electrolyzer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.27.5 718th Research Institute of CSIC Recent Developments/Updates
  - 9.27.6 718th Research Institute of CSIC Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 PEM Hydrogen Electrolyzer Industry Chain
- 10.2 PEM Hydrogen Electrolyzer Upstream Analysis
  - 10.2.1 PEM Hydrogen Electrolyzer Core Raw Materials
  - 10.2.2 Main Manufacturers of PEM Hydrogen Electrolyzer Core Raw Materials
- 10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 PEM Hydrogen Electrolyzer Production Mode

10.6 PEM Hydrogen Electrolyzer Procurement Model

10.7 PEM Hydrogen Electrolyzer Industry Sales Model and Sales Channels

10.7.1 PEM Hydrogen Electrolyzer Sales Model

10.7.2 PEM Hydrogen Electrolyzer Typical Distributors

## **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 PEM Hydrogen Electrolyzer Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World PEM Hydrogen Electrolyzer Production Value by Region (2021-2026) & (USD Million)

Table 3. World PEM Hydrogen Electrolyzer Production Value by Region (2027-2032) & (USD Million)

Table 4. World PEM Hydrogen Electrolyzer Production Value Market Share by Region (2021-2026)

Table 5. World PEM Hydrogen Electrolyzer Production Value Market Share by Region (2027-2032)

Table 6. World PEM Hydrogen Electrolyzer Production by Region (2021-2026) & (Units)

Table 7. World PEM Hydrogen Electrolyzer Production by Region (2027-2032) & (Units)

Table 8. World PEM Hydrogen Electrolyzer Production Market Share by Region (2021-2026)

Table 9. World PEM Hydrogen Electrolyzer Production Market Share by Region (2027-2032)

Table 10. World PEM Hydrogen Electrolyzer Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World PEM Hydrogen Electrolyzer Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. PEM Hydrogen Electrolyzer Major Market Trends

Table 13. World PEM Hydrogen Electrolyzer Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World PEM Hydrogen Electrolyzer Consumption by Region (2021-2026) & (Units)

Table 15. World PEM Hydrogen Electrolyzer Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World PEM Hydrogen Electrolyzer Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key PEM Hydrogen Electrolyzer Producers in 2025

Table 18. World PEM Hydrogen Electrolyzer Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key PEM Hydrogen Electrolyzer Producers in 2025

- Table 20. World PEM Hydrogen Electrolyzer Average Price by Manufacturer (2021-2026) & (K US\$/Unit)
- Table 21. Global PEM Hydrogen Electrolyzer Company Evaluation Quadrant
- Table 22. World PEM Hydrogen Electrolyzer Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and PEM Hydrogen Electrolyzer Production Site of Key Manufacturer
- Table 24. PEM Hydrogen Electrolyzer Market: Company Product Type Footprint
- Table 25. PEM Hydrogen Electrolyzer Market: Company Product Application Footprint
- Table 26. PEM Hydrogen Electrolyzer Competitive Factors
- Table 27. PEM Hydrogen Electrolyzer New Entrant and Capacity Expansion Plans
- Table 28. PEM Hydrogen Electrolyzer Mergers & Acquisitions Activity
- Table 29. United States VS China PEM Hydrogen Electrolyzer Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 30. United States VS China PEM Hydrogen Electrolyzer Production Comparison, (2021 & 2025 & 2032) & (Units)
- Table 31. United States VS China PEM Hydrogen Electrolyzer Consumption Comparison, (2021 & 2025 & 2032) & (Units)
- Table 32. United States Based PEM Hydrogen Electrolyzer Manufacturers, Headquarters and Production Site (States, Country)
- Table 33. United States Based Manufacturers PEM Hydrogen Electrolyzer Production Value, (2021-2026) & (USD Million)
- Table 34. United States Based Manufacturers PEM Hydrogen Electrolyzer Production Value Market Share (2021-2026)
- Table 35. United States Based Manufacturers PEM Hydrogen Electrolyzer Production (2021-2026) & (Units)
- Table 36. United States Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share (2021-2026)
- Table 37. China Based PEM Hydrogen Electrolyzer Manufacturers, Headquarters and Production Site (Province, Country)
- Table 38. China Based Manufacturers PEM Hydrogen Electrolyzer Production Value, (2021-2026) & (USD Million)
- Table 39. China Based Manufacturers PEM Hydrogen Electrolyzer Production Value Market Share (2021-2026)
- Table 40. China Based Manufacturers PEM Hydrogen Electrolyzer Production, (2021-2026) & (Units)
- Table 41. China Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share (2021-2026)
- Table 42. Rest of World Based PEM Hydrogen Electrolyzer Manufacturers,

Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share (2021-2026)

Table 47. World PEM Hydrogen Electrolyzer Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World PEM Hydrogen Electrolyzer Production by Type (2021-2026) & (Units)

Table 49. World PEM Hydrogen Electrolyzer Production by Type (2027-2032) & (Units)

Table 50. World PEM Hydrogen Electrolyzer Production Value by Type (2021-2026) & (USD Million)

Table 51. World PEM Hydrogen Electrolyzer Production Value by Type (2027-2032) & (USD Million)

Table 52. World PEM Hydrogen Electrolyzer Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World PEM Hydrogen Electrolyzer Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World PEM Hydrogen Electrolyzer Production Value by Form, (USD Million), 2021 & 2025 & 2032

Table 55. World PEM Hydrogen Electrolyzer Production by Form (2021-2026) & (Units)

Table 56. World PEM Hydrogen Electrolyzer Production by Form (2027-2032) & (Units)

Table 57. World PEM Hydrogen Electrolyzer Production Value by Form (2021-2026) & (USD Million)

Table 58. World PEM Hydrogen Electrolyzer Production Value by Form (2027-2032) & (USD Million)

Table 59. World PEM Hydrogen Electrolyzer Average Price by Form (2021-2026) & (K US\$/Unit)

Table 60. World PEM Hydrogen Electrolyzer Average Price by Form (2027-2032) & (K US\$/Unit)

Table 61. World PEM Hydrogen Electrolyzer Production Value by Design, (USD Million), 2021 & 2025 & 2032

Table 62. World PEM Hydrogen Electrolyzer Production by Design (2021-2026) & (Units)

Table 63. World PEM Hydrogen Electrolyzer Production by Design (2027-2032) & (Units)

Table 64. World PEM Hydrogen Electrolyzer Production Value by Design (2021-2026) & (USD Million)

Table 65. World PEM Hydrogen Electrolyzer Production Value by Design (2027-2032) & (USD Million)

Table 66. World PEM Hydrogen Electrolyzer Average Price by Design (2021-2026) & (K US\$/Unit)

Table 67. World PEM Hydrogen Electrolyzer Average Price by Design (2027-2032) & (K US\$/Unit)

Table 68. World PEM Hydrogen Electrolyzer Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World PEM Hydrogen Electrolyzer Production by Application (2021-2026) & (Units)

Table 70. World PEM Hydrogen Electrolyzer Production by Application (2027-2032) & (Units)

Table 71. World PEM Hydrogen Electrolyzer Production Value by Application (2021-2026) & (USD Million)

Table 72. World PEM Hydrogen Electrolyzer Production Value by Application (2027-2032) & (USD Million)

Table 73. World PEM Hydrogen Electrolyzer Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World PEM Hydrogen Electrolyzer Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Proton Onsite (Nel Hydrogen) Basic Information, Manufacturing Base and Competitors

Table 76. Proton Onsite (Nel Hydrogen) Major Business

Table 77. Proton Onsite (Nel Hydrogen) PEM Hydrogen Electrolyzer Product and Services

Table 78. Proton Onsite (Nel Hydrogen) PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Proton Onsite (Nel Hydrogen) Recent Developments/Updates

Table 80. Proton Onsite (Nel Hydrogen) Competitive Strengths & Weaknesses

Table 81. Accelera Basic Information, Manufacturing Base and Competitors

Table 82. Accelera Major Business

Table 83. Accelera PEM Hydrogen Electrolyzer Product and Services

Table 84. Accelera PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Accelera Recent Developments/Updates

Table 86. Accelera Competitive Strengths & Weaknesses

Table 87. Cummins Basic Information, Manufacturing Base and Competitors

Table 88. Cummins Major Business

Table 89. Cummins PEM Hydrogen Electrolyzer Product and Services

Table 90. Cummins PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Cummins Recent Developments/Updates

Table 92. Cummins Competitive Strengths & Weaknesses

Table 93. Elogen Basic Information, Manufacturing Base and Competitors

Table 94. Elogen Major Business

Table 95. Elogen PEM Hydrogen Electrolyzer Product and Services

Table 96. Elogen PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Elogen Recent Developments/Updates

Table 98. Elogen Competitive Strengths & Weaknesses

Table 99. ITM Power Basic Information, Manufacturing Base and Competitors

Table 100. ITM Power Major Business

Table 101. ITM Power PEM Hydrogen Electrolyzer Product and Services

Table 102. ITM Power PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. ITM Power Recent Developments/Updates

Table 104. ITM Power Competitive Strengths & Weaknesses

Table 105. IMI Basic Information, Manufacturing Base and Competitors

Table 106. IMI Major Business

Table 107. IMI PEM Hydrogen Electrolyzer Product and Services

Table 108. IMI PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. IMI Recent Developments/Updates

Table 110. IMI Competitive Strengths & Weaknesses

Table 111. H-TEC SYSTEMS Basic Information, Manufacturing Base and Competitors

Table 112. H-TEC SYSTEMS Major Business

Table 113. H-TEC SYSTEMS PEM Hydrogen Electrolyzer Product and Services

Table 114. H-TEC SYSTEMS PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. H-TEC SYSTEMS Recent Developments/Updates

Table 116. H-TEC SYSTEMS Competitive Strengths & Weaknesses

Table 117. Toshiba Basic Information, Manufacturing Base and Competitors

Table 118. Toshiba Major Business

- Table 119. Toshiba PEM Hydrogen Electrolyzer Product and Services
- Table 120. Toshiba PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Toshiba Recent Developments/Updates
- Table 122. Toshiba Competitive Strengths & Weaknesses
- Table 123. Kobelco Eco-Solutions Basic Information, Manufacturing Base and Competitors
- Table 124. Kobelco Eco-Solutions Major Business
- Table 125. Kobelco Eco-Solutions PEM Hydrogen Electrolyzer Product and Services
- Table 126. Kobelco Eco-Solutions PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Kobelco Eco-Solutions Recent Developments/Updates
- Table 128. Kobelco Eco-Solutions Competitive Strengths & Weaknesses
- Table 129. Siemens Basic Information, Manufacturing Base and Competitors
- Table 130. Siemens Major Business
- Table 131. Siemens PEM Hydrogen Electrolyzer Product and Services
- Table 132. Siemens PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Siemens Recent Developments/Updates
- Table 134. Siemens Competitive Strengths & Weaknesses
- Table 135. Kyros Hydrogen Solutions Basic Information, Manufacturing Base and Competitors
- Table 136. Kyros Hydrogen Solutions Major Business
- Table 137. Kyros Hydrogen Solutions PEM Hydrogen Electrolyzer Product and Services
- Table 138. Kyros Hydrogen Solutions PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Kyros Hydrogen Solutions Recent Developments/Updates
- Table 140. Kyros Hydrogen Solutions Competitive Strengths & Weaknesses
- Table 141. Hystar Basic Information, Manufacturing Base and Competitors
- Table 142. Hystar Major Business
- Table 143. Hystar PEM Hydrogen Electrolyzer Product and Services
- Table 144. Hystar PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Hystar Recent Developments/Updates
- Table 146. Hystar Competitive Strengths & Weaknesses
- Table 147. Plug Power Basic Information, Manufacturing Base and Competitors
- Table 148. Plug Power Major Business

- Table 149. Plug Power PEM Hydrogen Electrolyzer Product and Services
- Table 150. Plug Power PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Plug Power Recent Developments/Updates
- Table 152. Plug Power Competitive Strengths & Weaknesses
- Table 153. Quest One Basic Information, Manufacturing Base and Competitors
- Table 154. Quest One Major Business
- Table 155. Quest One PEM Hydrogen Electrolyzer Product and Services
- Table 156. Quest One PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. Quest One Recent Developments/Updates
- Table 158. Quest One Competitive Strengths & Weaknesses
- Table 159. Elchemtech Basic Information, Manufacturing Base and Competitors
- Table 160. Elchemtech Major Business
- Table 161. Elchemtech PEM Hydrogen Electrolyzer Product and Services
- Table 162. Elchemtech PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. Elchemtech Recent Developments/Updates
- Table 164. Elchemtech Competitive Strengths & Weaknesses
- Table 165. H2B2 Basic Information, Manufacturing Base and Competitors
- Table 166. H2B2 Major Business
- Table 167. H2B2 PEM Hydrogen Electrolyzer Product and Services
- Table 168. H2B2 PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. H2B2 Recent Developments/Updates
- Table 170. H2B2 Competitive Strengths & Weaknesses
- Table 171. Beijing Sany Heavy Industry Basic Information, Manufacturing Base and Competitors
- Table 172. Beijing Sany Heavy Industry Major Business
- Table 173. Beijing Sany Heavy Industry PEM Hydrogen Electrolyzer Product and Services
- Table 174. Beijing Sany Heavy Industry PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. Beijing Sany Heavy Industry Recent Developments/Updates
- Table 176. Beijing Sany Heavy Industry Competitive Strengths & Weaknesses

Table 177. Guangdong Cawolo Hydrogen Technology Basic Information, Manufacturing Base and Competitors

Table 178. Guangdong Cawolo Hydrogen Technology Major Business

Table 179. Guangdong Cawolo Hydrogen Technology PEM Hydrogen Electrolyzer Product and Services

Table 180. Guangdong Cawolo Hydrogen Technology PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Guangdong Cawolo Hydrogen Technology Recent Developments/Updates

Table 182. Guangdong Cawolo Hydrogen Technology Competitive Strengths & Weaknesses

Table 183. Shanghai Kinghet Basic Information, Manufacturing Base and Competitors

Table 184. Shanghai Kinghet Major Business

Table 185. Shanghai Kinghet PEM Hydrogen Electrolyzer Product and Services

Table 186. Shanghai Kinghet PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Shanghai Kinghet Recent Developments/Updates

Table 188. Shanghai Kinghet Competitive Strengths & Weaknesses

Table 189. Guangdong Qingneng Ruilong New Energy Technology Basic Information, Manufacturing Base and Competitors

Table 190. Guangdong Qingneng Ruilong New Energy Technology Major Business

Table 191. Guangdong Qingneng Ruilong New Energy Technology PEM Hydrogen Electrolyzer Product and Services

Table 192. Guangdong Qingneng Ruilong New Energy Technology PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Guangdong Qingneng Ruilong New Energy Technology Recent Developments/Updates

Table 194. Guangdong Qingneng Ruilong New Energy Technology Competitive Strengths & Weaknesses

Table 195. Changchun Green Drive Hydrogen Technology Basic Information, Manufacturing Base and Competitors

Table 196. Changchun Green Drive Hydrogen Technology Major Business

Table 197. Changchun Green Drive Hydrogen Technology PEM Hydrogen Electrolyzer Product and Services

Table 198. Changchun Green Drive Hydrogen Technology PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. Changchun Green Drive Hydrogen Technology Recent Developments/Updates

Table 200. Changchun Green Drive Hydrogen Technology Competitive Strengths & Weaknesses

Table 201. Shandong Saikesaisi Hydrogen Energy Basic Information, Manufacturing Base and Competitors

Table 202. Shandong Saikesaisi Hydrogen Energy Major Business

Table 203. Shandong Saikesaisi Hydrogen Energy PEM Hydrogen Electrolyzer Product and Services

Table 204. Shandong Saikesaisi Hydrogen Energy PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Shandong Saikesaisi Hydrogen Energy Recent Developments/Updates

Table 206. Shandong Saikesaisi Hydrogen Energy Competitive Strengths & Weaknesses

Table 207. Huizhou EVE Hydrogen Energy Basic Information, Manufacturing Base and Competitors

Table 208. Huizhou EVE Hydrogen Energy Major Business

Table 209. Huizhou EVE Hydrogen Energy PEM Hydrogen Electrolyzer Product and Services

Table 210. Huizhou EVE Hydrogen Energy PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Huizhou EVE Hydrogen Energy Recent Developments/Updates

Table 212. Huizhou EVE Hydrogen Energy Competitive Strengths & Weaknesses

Table 213. Hefei Sungrow Basic Information, Manufacturing Base and Competitors

Table 214. Hefei Sungrow Major Business

Table 215. Hefei Sungrow PEM Hydrogen Electrolyzer Product and Services

Table 216. Hefei Sungrow PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Hefei Sungrow Recent Developments/Updates

Table 218. Hefei Sungrow Competitive Strengths & Weaknesses

Table 219. Amoy Island Hydrogen (Xiamen) Technology Basic Information, Manufacturing Base and Competitors

Table 220. Amoy Island Hydrogen (Xiamen) Technology Major Business

Table 221. Amoy Island Hydrogen (Xiamen) Technology PEM Hydrogen Electrolyzer Product and Services

Table 222. Amoy Island Hydrogen (Xiamen) Technology PEM Hydrogen Electrolyzer

Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. Amoy Island Hydrogen (Xiamen) Technology Recent Developments/Updates

Table 224. Amoy Island Hydrogen (Xiamen) Technology Competitive Strengths & Weaknesses

Table 225. BriHyNergy (Shenzhen) Basic Information, Manufacturing Base and Competitors

Table 226. BriHyNergy (Shenzhen) Major Business

Table 227. BriHyNergy (Shenzhen) PEM Hydrogen Electrolyzer Product and Services

Table 228. BriHyNergy (Shenzhen) PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. BriHyNergy (Shenzhen) Recent Developments/Updates

Table 230. BriHyNergy (Shenzhen) Competitive Strengths & Weaknesses

Table 231. 718th Research Institute of CSIC Basic Information, Manufacturing Base and Competitors

Table 232. 718th Research Institute of CSIC Major Business

Table 233. 718th Research Institute of CSIC PEM Hydrogen Electrolyzer Product and Services

Table 234. 718th Research Institute of CSIC PEM Hydrogen Electrolyzer Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 235. 718th Research Institute of CSIC Recent Developments/Updates

Table 236. 718th Research Institute of CSIC Competitive Strengths & Weaknesses

Table 237. Global Key Players of PEM Hydrogen Electrolyzer Upstream (Raw Materials)

Table 238. Global PEM Hydrogen Electrolyzer Typical Customers

Table 239. PEM Hydrogen Electrolyzer Typical Distributors

## List Of Figures

### LIST OF FIGURES

- Figure 1. PEM Hydrogen Electrolyzer Picture
- Figure 2. World PEM Hydrogen Electrolyzer Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World PEM Hydrogen Electrolyzer Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World PEM Hydrogen Electrolyzer Production (2021-2032) & (Units)
- Figure 5. World PEM Hydrogen Electrolyzer Average Price (2021-2032) & (K US\$/Unit)
- Figure 6. World PEM Hydrogen Electrolyzer Production Value Market Share by Region (2021-2032)
- Figure 7. World PEM Hydrogen Electrolyzer Production Market Share by Region (2021-2032)
- Figure 8. North America PEM Hydrogen Electrolyzer Production (2021-2032) & (Units)
- Figure 9. Europe PEM Hydrogen Electrolyzer Production (2021-2032) & (Units)
- Figure 10. China PEM Hydrogen Electrolyzer Production (2021-2032) & (Units)
- Figure 11. Japan PEM Hydrogen Electrolyzer Production (2021-2032) & (Units)
- Figure 12. PEM Hydrogen Electrolyzer Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 15. World PEM Hydrogen Electrolyzer Consumption Market Share by Region (2021-2032)
- Figure 16. United States PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 17. China PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 18. Europe PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 19. Japan PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 20. South Korea PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 21. ASEAN PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 22. India PEM Hydrogen Electrolyzer Consumption (2021-2032) & (Units)
- Figure 23. Producer Shipments of PEM Hydrogen Electrolyzer by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 24. Global Four-firm Concentration Ratios (CR4) for PEM Hydrogen Electrolyzer Markets in 2025
- Figure 25. Global Four-firm Concentration Ratios (CR8) for PEM Hydrogen Electrolyzer Markets in 2025
- Figure 26. United States VS China: PEM Hydrogen Electrolyzer Production Value

Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: PEM Hydrogen Electrolyzer Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: PEM Hydrogen Electrolyzer Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share 2025

Figure 30. China Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share 2025

Figure 31. Rest of World Based Manufacturers PEM Hydrogen Electrolyzer Production Market Share 2025

Figure 32. World PEM Hydrogen Electrolyzer Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World PEM Hydrogen Electrolyzer Production Value Market Share by Type in 2025

Figure 34. Small Type

Figure 35. Medium Type

Figure 36. Large Type

Figure 37. World PEM Hydrogen Electrolyzer Production Market Share by Type (2021-2032)

Figure 38. World PEM Hydrogen Electrolyzer Production Value Market Share by Type (2021-2032)

Figure 39. World PEM Hydrogen Electrolyzer Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World PEM Hydrogen Electrolyzer Production Value by Form, (USD Million), 2021 & 2025 & 2032

Figure 41. World PEM Hydrogen Electrolyzer Production Value Market Share by Form in 2025

Figure 42. Modular Platform

Figure 43. Containerized Platform

Figure 44. World PEM Hydrogen Electrolyzer Production Market Share by Form (2021-2032)

Figure 45. World PEM Hydrogen Electrolyzer Production Value Market Share by Form (2021-2032)

Figure 46. World PEM Hydrogen Electrolyzer Average Price by Form (2021-2032) & (K US\$/Unit)

Figure 47. World PEM Hydrogen Electrolyzer Production Value by Design, (USD Million), 2021 & 2025 & 2032

Figure 48. World PEM Hydrogen Electrolyzer Production Value Market Share by Design

in 2025

Figure 49. Plug & Play

Figure 50. Others

Figure 51. World PEM Hydrogen Electrolyzer Production Market Share by Design (2021-2032)

Figure 52. World PEM Hydrogen Electrolyzer Production Value Market Share by Design (2021-2032)

Figure 53. World PEM Hydrogen Electrolyzer Average Price by Design (2021-2032) & (K US\$/Unit)

Figure 54. World PEM Hydrogen Electrolyzer Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World PEM Hydrogen Electrolyzer Production Value Market Share by Application in 2025

Figure 56. Power to Gas

Figure 57. Chemical & Refining

Figure 58. Metallurgy & Steel

Figure 59. Hydrogen Refueling Station

Figure 60. Power

Figure 61. Electronics & Semiconductor

Figure 62. Others

Figure 63. World PEM Hydrogen Electrolyzer Production Market Share by Application (2021-2032)

Figure 64. World PEM Hydrogen Electrolyzer Production Value Market Share by Application (2021-2032)

Figure 65. World PEM Hydrogen Electrolyzer Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 66. PEM Hydrogen Electrolyzer Industry Chain

Figure 67. PEM Hydrogen Electrolyzer Procurement Model

Figure 68. PEM Hydrogen Electrolyzer Sales Model

Figure 69. PEM Hydrogen Electrolyzer Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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