

Global PEM Water Electrolysis Iridium Catalyst Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PEM Water Electrolysis Iridium Catalyst market size is expected to reach \$ 4287 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

PEM water electrolysis iridium catalysts are iridium-based electrocatalysts used at the anode for the oxygen evolution reaction (OER) in proton exchange membrane (PEM) water electrolysis. The main forms include iridium oxide, iridium black, iridium-ruthenium oxides, doped iridium oxides, and support-supported iridium oxides. They are delivered as powders, inks, coated catalyst layers, or within membrane electrode assemblies (MEAs). The estimated overall gross margin is approximately 45%.

The market is primarily driven by the scaling of PEM electrolyzers and the need to reduce precious metal costs at the anode. PEM systems are characterized by high current density, rapid start-stop capability, and compatibility with variable renewable energy inputs. New green hydrogen projects directly increase demand for MEAs, catalyst-coated membranes (CCMs), and iridium-based OER catalysts. Commercially, the market remains heavily dependent on iridium oxide or iridium-based composites, with buyers focusing on iridium content, specific surface area, crystallography, stability, degradation over cycling, and batch-to-batch consistency.

The key growth challenge is not replacing iridium, but reducing iridium consumption per unit power while maintaining catalyst lifetime. Research and adoption are focusing on low-iridium, ultra-low-iridium, support-supported iridium oxide, and iridium-ruthenium composite systems. Price volatility and concentrated supply of iridium have led buyers to emphasize closed-loop recovery, supply security, and long-term framework agreements. Leading international precious metal suppliers maintain control over high-

end customers and recycling systems, while domestic suppliers are increasing market share through kilogram-scale production, localization validation, and demonstration project deployment.

Short-term market growth is affected by green hydrogen project delays and PEM electrolyzer utilization rates, causing shipment fluctuations. In the medium to long term, policy targets, industrial decarbonization, and large-scale electrolyzer deployment will expand demand. Due to the scarcity of iridium, future competition will focus on low-loading formulations, commercial lifetime data, MEA process compatibility, and precious metal recovery capabilities.

This report studies the global PEM Water Electrolysis Iridium Catalyst production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global PEM Water Electrolysis Iridium Catalyst total production and demand, 2021-2032, (kg)

Global PEM Water Electrolysis Iridium Catalyst total production value, 2021-2032, (USD Million)

Global PEM Water Electrolysis Iridium Catalyst production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global PEM Water Electrolysis Iridium Catalyst consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: PEM Water Electrolysis Iridium Catalyst domestic production, consumption, key domestic manufacturers and share

Global PEM Water Electrolysis Iridium Catalyst production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global PEM Water Electrolysis Iridium Catalyst production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global PEM Water Electrolysis Iridium Catalyst production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global PEM Water Electrolysis Iridium Catalyst

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 Heraeus Precious Metals, TANAKA Precious Metals, Umicore, Johnson Matthey, BASF ECMS, Pajarito Powder, 3M, Jiping New Energy, Shengshui Technology, American Elements, 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 Water Electrolysis Iridium Catalyst market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 Water Electrolysis Iridium Catalyst Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PEM Water Electrolysis Iridium Catalyst Market, Segmentation by Type:

- Catalyst Powder
- Catalyst Ink
- Catalyst-Coated Membrane
- Catalyst-Coated Electrode

Global PEM Water Electrolysis Iridium Catalyst Market, Segmentation by Catalyst Chemistry:

- Iridium Oxide Catalyst
- Iridium Black Catalyst
- Iridium-Ruthenium Oxide Catalyst
- Doped Iridium Oxide Catalyst
- Supported Iridium Oxide Catalyst

Global PEM Water Electrolysis Iridium Catalyst Market, Segmentation by Iridium Content:

- High-Iridium Catalyst
- Medium-Iridium Catalyst
- Low-Iridium Catalyst
- Ultra-Low-Iridium Catalyst

Global PEM Water Electrolysis Iridium Catalyst Market, Segmentation by Support System:

Unsupported Catalyst

Oxide-Supported Catalyst

Conductive-Oxide-Supported Catalyst

Hybrid-Support Catalyst

Global PEM Water Electrolysis Iridium Catalyst Market, Segmentation by Application:

Commercial PEM Electrolyzer Manufacturing

PEM MEA and CCM Manufacturing

Pilot and Demonstration Hydrogen Systems

Catalyst Ink and Coating Process Development

Electrochemical R&D and Benchmarking

Iridium Recovery and Refurbishment

Companies Profiled:

Heraeus Precious Metals

TANAKA Precious Metals

Umicore

Johnson Matthey

BASF ECMS

Pajarito Powder

3M

Jiping New Energy

Shengshui Technology

American Elements

Key Questions Answered:

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

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