

Fuel Cell Powertrain Market Size, Share & Trends Analysis Report By Component (Fuel Cell Module (Stack + BoP), Hydrogen Storage System), By Product, By Application, By End User, By Region, And Segment Forecasts, 2025 - 2033

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Abstracts

Fuel Cell Powertrain Market Summary

The global fuel cell powertrain market size was estimated at USD 685.3 million in 2024, and is projected to reach USD 22,498.1 million by 2033, growing at a CAGR of 48.3% from 2025 to 2033. The market is gaining momentum, driven by growing government incentives for zero-emission vehicles and the rising demand for fuel cell-powered trucks and buses across logistics and public transport sectors.

Continuous cost reductions in fuel cell systems and hydrogen storage technologies are also supporting broader adoption, alongside the steady expansion of green hydrogen production infrastructure worldwide. Emerging markets in the Middle East & Africa and Latin America are creating new opportunities for deploying fuel cell-based heavy-duty fleets, particularly in regions seeking alternatives to diesel engines. However, high upfront costs of fuel cell systems compared to battery-electric alternatives remain a significant challenge, hindering faster commercialization across cost-sensitive segments.

Government incentives have played a pivotal role in accelerating the deployment of fuel cell powertrains by reducing upfront costs and supporting infrastructure development. These policy measures are aimed at fostering the transition away from internal combustion engines and promoting the adoption of zero-emission mobility solutions across commercial and public sectors. Incentives typically include purchase subsidies,

tax exemptions, research and development funding, and direct support for fleet retrofitting or replacement. These initiatives are particularly critical for high-cost segments like fuel cell-powered trucks and buses, where operating economics remain a barrier without government intervention.

For instance, in July 2025, Germany's Federal Ministry for Transport launched a new funding round to promote the adoption of zero-emission bus fleets. The initiative covers battery-electric and hydrogen-powered buses, as well as the retrofitting of existing diesel vehicles, with the goal of expediting the decarbonization of public transport systems nationwide. In May 2023, the UK government, along with industry partners, announced USD 104.43 million (GBP 77 million) in funding for zero-emission vehicle initiatives. The program included support for the HYER POWER hydrogen fuel cell range extender designed for emergency service vehicles. These developments reinforce the strategic commitment by governments to scale hydrogen fuel cell mobility, which is expected to significantly drive the expansion of the fuel cell powertrain industry over the forecast period.

The growing need to decarbonize heavy-duty transportation is accelerating the adoption of fuel cell-powered trucks and buses, particularly in logistics and public transit sectors where long range, quick refueling, and high payload capacity are critical. Fleet operators are increasingly turning to hydrogen fuel cell vehicles as a viable alternative to diesel, especially for long-haul routes and intensive urban service cycles. Public transport agencies are also prioritizing low-emission solutions to meet national and regional climate targets, making fuel cell buses a strategic investment. For instance, in July 2025, Oman's state-owned operator Mwasalat signed an agreement with Birba to deploy hydrogen-powered buses for the Green Hydrogen Summit in Muscat. Supported by Shell's dedicated green hydrogen refueling station, the initiative illustrates Oman's broader strategy to advance hydrogen mobility and reduce emissions in the transport sector. Such developments underscore the growing interest in fuel cell vehicles among logistics providers and public agencies, signaling a strong market shift toward zero-emission heavy-duty mobility platforms.

Ballard Power Systems Inc.

Plug Power Inc.

Toyota Motor Corporation

Hyundai Motor Company

Cummins Inc.

Symbio (Faurecia & Michelin JV)

Bosch Hydrogen Powertrain Systems (Bosch Group)

AVL List GmbH

Horizon Fuel Cell Technologies Pte. Ltd.

Sinosynergy Hydrogen Energy Technology Co., Ltd.

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