

Global Air-Cooled Stack System Market Growth 2026-2032

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Abstracts

The global Air-Cooled Stack System market size is predicted to grow from US\$ 470 million in 2025 to US\$ 2033 million in 2032; it is expected to grow at a CAGR of 23.4% from 2026 to 2032.

An air-cooled stack system refers to a hydrogen fuel cell stack system that uses air as the cooling medium. It generates electricity through the electrochemical reaction of hydrogen and oxygen in multiple individual cell units (i.e., the stack). Unlike liquid-cooled systems, air-cooled systems cool the stack using natural airflow or airflow provided by fans, thus maintaining the system within its normal operating temperature range. Air-cooled stack systems offer advantages such as simple structure, low cost, and high integration, making them suitable for low- to medium-power applications, such as portable power supplies, drones, light electric vehicles, and backup power. An air-cooled stack system typically consists of a stack module, an airflow control system, and a battery management system. The airflow control system is responsible for introducing external air into the stack, ensuring effective heat dissipation during operation. The battery management system monitors the battery status, temperature, and voltage to ensure safe system operation. In 2025, the global production of air-cooled stack systems was approximately 648,700 units, with an average selling price of US\$740.204 per unit and a gross profit margin of 30.78%. Companies produced approximately 100,000 air-cooled fuel cell systems annually.

Case Study: GCL New Energy Holdings Limited's 12kW air-cooled hydrogen fuel cell and its mass-produced 20kW single-gate air-cooled hydrogen fuel cell H400 are mainly used in medium-to-high power hydrogen-powered drones, hydrogen-powered yachts, and other high-power products. Shengshi Yingchuang officially released its pioneering 20kW high-power air-cooled fuel cell stack based on a cathode-enclosed metal bipolar

plate design.

Fuel cells can be divided into water-cooled fuel cell systems and air-cooled fuel cell systems. Water-cooled fuel cell systems have higher rated power and are more complex in structure and control, but they started earlier. The fuel cell industry has gradually expanded from high-power water-cooled stack systems used in passenger cars and commercial vehicles to small-power air-cooled stack systems used in drones, forklifts, bicycles, etc. With the increasing global demand for green energy and zero-emission vehicles, the market for small air-cooled hydrogen fuel cells has ushered in new opportunities. Hydrogen energy, as a key form of sustainable energy, is gaining increasing favor from countries and companies. Hydrogen fuel cells have the characteristics of high energy density and zero emissions, making them particularly suitable for high-power demand fields such as electric vehicles, drones, and portable power devices. In addition, policy support, technological innovation, and the improvement of hydrogen supply infrastructure have provided strong driving forces for the development of this industry. Despite the broad market prospects, some challenges remain. First, the production cost of hydrogen fuel cells is relatively high, especially in miniaturized and low-cost applications, which may affect their large-scale commercialization process. Second, the construction of hydrogen infrastructure remains a key factor restricting market development, and the construction of hydrogen refueling stations and other infrastructure in many regions is still inadequate. Finally, the complexity of technological research and development leads to high R&D costs and technological bottlenecks, requiring companies to continuously innovate and optimize their technologies. With the diversification of market demand, especially in the fields of electric vehicles and drones, the demand for small air-cooled hydrogen fuel cells is constantly growing. In the coming years, this market is expected to gradually expand, particularly driven by green energy promotion policies in Asia, North America, and Europe, leading to a continued increase in market penetration. Companies need to focus on product performance, cost control, and hydrogen supply chain optimization to better meet market demands.

LP Information, Inc. (LPI) ' newest research report, the "Air-Cooled Stack System Industry Forecast" looks at past sales and reviews total world Air-Cooled Stack System sales in 2025, providing a comprehensive analysis by region and market sector of projected Air-Cooled Stack System sales for 2026 through 2032. With Air-Cooled Stack System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air-Cooled Stack System industry.

This Insight Report provides a comprehensive analysis of the global Air-Cooled Stack

System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air-Cooled Stack System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air-Cooled Stack System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air-Cooled Stack System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Air-Cooled Stack System.

This report presents a comprehensive overview, market shares, and growth opportunities of Air-Cooled Stack System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Open Air-cooled

Closed Air-cooled

Segmentation by Power:

Low Power

Medium Power

High Power

Segmentation by Bipolar Plate:

Metal Stack

Graphite Stack

Segmentation by Application:

Two-wheeled Vehicles

Courier Trucks & Tricycles

Electric Motorcycles & AGVs & Sightseeing Vehicles & Forklifts & Golf Carts

Drones & Service Robots

Portable Generators

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Plug Power Inc.

Intelligent Energy Limited.

Ballard Power Systems Inc.

Horizon Fuel Cell Technologies

Spectronik

Doosan Corporation

Toshiba

Pearl Hydrogen Co.,Ltd.

Beijing Hyran New Energy Technology Co.,Ltd

GCL New Energy Holdings Ltd

Bhhyro

Panxingtech

Hydrogen Craft

Anliu Technology

Shanghai Hydrogen Propulsion Technology Co.,Ltd.

Shenzhen Hynovation Technologies Co.,Ltd.

Guangzhou Hezhiyuan Hydrogen Energy Technology Co., Ltd.

TROOWIN

Sichuan Light Green Hydrogen Energy Development Co., Ltd.

Youon

Tianneng Group

Shengshi Yingchuang (Yulin) Hydrogen Energy

easyh2power

Suzhou Siner Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air-Cooled Stack System market?

What factors are driving Air-Cooled Stack System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Air-Cooled Stack System market opportunities vary by end market size?

How does Air-Cooled Stack System break out by Type, by Application?

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