

Fuel Cell Generator Market by End User (Marine, Aquaculture, Construction, Agriculture, Data Centers, Emergency Response Generators), Size (Small (Up to 200 kW), Large (>200 kW)), Fuel Type (Hydrogen, Ammonia, Methanol), Region - Global Forecast to 2030

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Abstracts

The global fuel cell generator market is estimated to grow from 0.4 billion in 2023 to USD 2.1 billion by 2030; it is expected to record a CAGR of 25.4% during the forecast period. Increasing number of data centers and reliable energy for emergency response will drive the fuel cell generator market in the forecasted period.

“Hydrogen: The largest segment of the fuel cell generator market, by fuel type “

Based on fuel type, the fuel cell generator market has been split into three types: hydrogen, ammonia, and methanol. Compared to other fuel cell technologies, hydrogen fuel cells have quick refueling times, enabling speedy deployment for vehicles and other uses. Additionally, hydrogen fuel cells have a high-power density, which allows them to supply a lot of power in a tiny, light design.

“Small size (up to 200 kW) segment is expected to emerge as the largest segment based on size”

By size, the fuel cell generator market has been segmented into small scale (up to 200 kW) and large scale (above 200 kW). Recent advancements in fuel cell technology, such as improved efficiency, durability, and cost reduction, have made small-scale fuel cell generators more viable and attractive. These technological developments have increased the overall performance and reliability of fuel cell systems, making them a practical and competitive option for small-scale power generation applications.

“By end user, the marine segment is expected to be the fastest growing market during the forecast period.”

Based on end user, the fuel cell generator market is segmented into marine, aquaculture, construction, agriculture, data centers, and emergency response generators. Fuel cell generators can be used as auxiliary power units on ships and boats. They provide a reliable and efficient source of electricity for various onboard systems, including lighting, navigation, communication equipment, refrigeration, and other electrical loads. Fuel cells offer quiet operation, reduced vibrations, and improved energy efficiency compared to traditional diesel generators, enhancing the overall onboard experience.

Europe is expected to be the fastest growing region in the fuel cell generator market

Europe is expected to be the fastest growing region for the fuel cell generator market during the forecast period. The region has been at the forefront of sustainability initiatives, with strong commitments to reducing greenhouse gas emissions and transitioning to clean energy sources. Fuel cell generators, offering low-emission and zero-pollution power generation, align perfectly with these environmental goals. Additionally, Europe has established a favorable policy and regulatory framework to promote the development and deployment of fuel cell technology. Supportive measures such as financial incentives, grants, and research funding have spurred innovation and investments in the fuel cell sector. Furthermore, Europe has developed a robust hydrogen infrastructure, enabling the efficient production, storage, and distribution of hydrogen as a fuel for fuel cell generators.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Levels- 25%, and Others- 45%

By Region: Asia Pacific- 53%, North America- 27%, Europe- 20%,

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3:

The fuel cell generator market is dominated by a few major players that have a wide regional presence. The leading players in the fuel cell generator market are Bloom Energy (US), Doosan Fuel Cell Co., Ltd. (South Korea), Ballard Power Systems (Canada), ABB (Switzerland), and Loop Energy Inc. (Canada).

Research Coverage:

The report defines, describes, and forecasts the global fuel cell generator market, by type, end user, size, fuel type, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value, and future trends in the fuel cell generator market.

Key Benefits of Buying the Report

The fuel cell generator market has experienced significant development and growth in recent years. The increasing demand for portable power solutions, driven by factors such as outdoor recreational activities, emergency preparedness, and the need for reliable off-grid power, has propelled the market forward. Key market players have been actively engaged in product development, introducing innovative features such as higher power capacities, improved portability, faster charging, integration with renewable energy sources, advanced control systems, connectivity options, and enhanced safety features. Additionally, the market has witnessed the expansion of product offerings with varying size, catering to different end-use requirements.

Product Development/ Innovation: Manufacturers in the fuel cell generators market actively engage in product development and innovation to enhance the capabilities of their offerings. They focus on increasing power capacity through advancements in battery technology, improving portability by reducing weight and refining the form factor, and enabling faster charging through enhanced

charging efficiency. Integration of renewable energy sources, such as solar panels, is a key area of innovation, along with the development of advanced control and monitoring systems for better user control and visibility.

Market Development: The fuel cell generator market offers substantial growth opportunities driven by several factors. Primarily, the increasing global focus on sustainability and the transition towards cleaner energy sources have created a favorable environment for fuel cell technology. Fuel cell generators offer low-emission and zero-pollution power generation, aligning with environmental goals and regulations. Secondly, advancements in fuel cell technology, such as improved efficiency, durability, and cost-effectiveness, have enhanced their performance and made them more attractive for various applications. These technological developments have expanded the market potential for fuel cell generators in sectors such as transportation, residential, commercial, and industrial. Additionally, government support through incentives, policies, and funding programs further accelerates the adoption of fuel cell generators.

Market Diversification: Doosan Fuel Cell and the government of South Australia have entered into an agreement that encompasses several key areas of collaboration. The agreement involves the exchange of equipment and expertise to facilitate the production of environmentally friendly hydrogen and its derivatives.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Bloom Energy (US), Doosan Fuel Cell Co., Ltd. (South Korea), Ballard Power Systems (Canada), ABB (Switzerland), and Loop Energy Inc. (Canada) among others in the fuel cell generator market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS AND EXCLUSIONS

1.3.1 FUEL CELL GENERATOR MARKET, BY END USER

1.3.2 FUEL CELL GENERATOR MARKET, BY REGION

1.4 MARKET SCOPE

1.4.1 MARKET SEGMENTATION

1.4.2 REGIONAL SCOPE

1.4.3 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 LIMITATIONS

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

1.8.1 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 FUEL CELL GENERATOR MARKET: RESEARCH DESIGN

2.2 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 2 DATA TRIANGULATION METHODOLOGY

2.2.1 SECONDARY DATA

2.2.1.1 Key data from secondary sources

2.2.2 PRIMARY DATA

2.2.2.1 Key data from primary sources

2.2.2.2 Breakdown of primaries

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.3 MARKET SIZE ESTIMATION

2.3.1 SUPPLY-SIDE ANALYSIS

FIGURE 4 KEY METRICS CONSIDERED FOR ASSESSING SUPPLY OF FUEL CELL GENERATORS

FIGURE 5 FUEL CELL GENERATOR MARKET: SUPPLY-SIDE ANALYSIS

2.3.1.1 Supply-side calculations

2.3.1.2 Supply-side assumptions

FIGURE 6 FUEL CELL GENERATOR MARKET: MARKET SHARE ANALYSIS, 2022

2.3.2 DEMAND-SIDE ANALYSIS

2.3.2.1 Demand-side calculations

2.3.2.2 Demand-side assumptions

2.3.2.3 Demand-side limitations

2.3.3 MARKET FORECAST

2.4 IMPACT OF RECESSION

3 EXECUTIVE SUMMARY

TABLE 1 FUEL CELL GENERATOR MARKET SNAPSHOT

FIGURE 7 NORTH AMERICA HELD LARGEST SHARE OF FUEL CELL GENERATOR MARKET IN 2022

FIGURE 8 DATA CENTERS TO CAPTURE LARGEST SHARE OF FUEL CELL GENERATOR MARKET IN 2030

FIGURE 9 HYDROGEN TO CAPTURE LARGEST SHARE OF FUEL CELL GENERATOR MARKET, BY FUEL TYPE, IN 2030

FIGURE 10 SMALL-SCALE FUEL CELL GENERATORS PRODUCING UP TO 200 KW OF POWER TO CAPTURE LARGER MARKET SHARE IN 2030

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN FUEL CELL GENERATOR MARKET

FIGURE 11 RISING DEMAND FOR CLEAN POWER GENERATION TO BOOST ADOPTION OF FUEL CELL GENERATORS BY ENVIRONMENTALLY CONSCIOUS INDUSTRIES

4.2 FUEL CELL GENERATOR MARKET, BY REGION

FIGURE 12 EUROPEAN FUEL CELL GENERATOR MARKET TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

4.3 FUEL CELL GENERATOR MARKET, BY END USER

FIGURE 13 DATA CENTERS TO ACCOUNT FOR LARGEST MARKET SHARE IN 2030

4.4 FUEL CELL GENERATOR MARKET, BY FUEL TYPE

FIGURE 14 HYDROGEN TO ACCOUNT FOR LARGEST MARKET SHARE IN 2030

4.5 FUEL CELL GENERATOR MARKET, BY SIZE

FIGURE 15 SMALL SCALE (UP TO 200 KW) SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2030

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 16 FUEL CELL GENERATOR MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Global focus on reducing carbon emissions and environmental impact

FIGURE 17 CO₂ EMISSIONS FROM ENERGY COMBUSTION AND INDUSTRIAL PROCESSES, GT CO₂ (2000–2022)

5.2.1.2 Rising need for reliable and constant power supply

5.2.2 RESTRAINTS

5.2.2.1 High cost of catalysts used in fuel cell generators

5.2.2.2 High capital expenditure associated with hydrogen energy storage

5.2.3 OPPORTUNITIES

5.2.3.1 Integration of renewable energy sources into power grids

5.2.3.2 Supportive government policies, incentives, and rebates on installation of fuel cell generators

FIGURE 18 CLEAN ENERGY INVESTMENTS BY ADVANCED ECONOMIES VS. EMERGING ECONOMIES, 2015–2021 (GT CO₂)

TABLE 2 POLICIES BY MAJOR ECONOMIES TO STIMULATE HYDROGEN DEMAND

5.2.4 CHALLENGES

5.2.4.1 Water management in proton-exchange membrane fuel cells

5.2.4.2 High operational temperature of solid oxide fuel cells

5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.3.1 REVENUE SHIFT AND NEW REVENUE POCKETS IN FUEL CELL GENERATOR MARKET

FIGURE 19 REVENUE SHIFT FOR FUEL CELL GENERATOR PROVIDERS

5.4 PRICING ANALYSIS

5.4.1 PEM BACKUP FUEL CELL GENERATOR INDICATIVE PRICING MODEL ANALYSIS

5.4.1.1 5 kW FCG stack and balance of plant (BoP) indicative cost

TABLE 3 PEM STACK COMPONENT COST SUMMARY FOR 5 KW BACKUP SYSTEM (USD), 2016

TABLE 4 PEM BALANCE OF PLANT (BOP) COST SUMMARY FOR 5 KW BACKUP SYSTEM (USD), 2016

TABLE 5 5 KW BACKUP SYSTEM BOP COST DISTRIBUTION

5.4.1.2 10 kW FCG stack and balance of plant (BoP) indicative cost

TABLE 6 PEM STACK COMPONENT COST SUMMARY FOR 10 KW BACKUP

SYSTEM (USD), 2016

TABLE 7 PEM BALANCE OF PLANT (BOP) COST SUMMARY FOR 10 KW BACKUP SYSTEM (USD), 2016

TABLE 8 10 KW BACKUP SYSTEM BOP COST DISTRIBUTION

5.4.2 PEM STACK AND SYSTEM BOP PRICING MODEL ANALYSIS

5.4.2.1 PEM stack component cost summary

TABLE 9 PEM STACK COMPONENT COST SUMMARY FOR 100 KW & 250 KW SYSTEMS (USD)

5.4.2.1.1 100 KW PEM stack component cost summary

FIGURE 20 100 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (100 STACKS/YEAR)

FIGURE 21 100 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (1,000 STACKS/YEAR)

FIGURE 22 100 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (10,000 STACKS/YEAR)

FIGURE 23 100 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (50,000 STACKS/YEAR)

5.4.2.1.2 250 KW PEM stack component cost summary

FIGURE 24 250 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (100 STACKS/YEAR)

FIGURE 25 250 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (1,000 STACKS/YEAR)

FIGURE 26 250 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (10,000 STACKS/YEAR)

FIGURE 27 250 KW PEM STACK COMPONENT COST SUMMARY BREAKUP (50,000 STACKS/YEAR)

5.4.2.2 PEM stack manufacturing cost summary

TABLE 10 PEM STACK MANUFACTURING COST SUMMARY: 100 KW & 250 KW SYSTEM (USD)

5.4.2.2.1 100 KW PEM stack manufacturing cost summary

FIGURE 28 100 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP (100 STACKS/YEAR)

FIGURE 29 100 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP (1,000 STACKS/YEAR)

FIGURE 30 100 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP (10,000 STACKS/YEAR)

FIGURE 31 100 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP (50,000 STACKS/YEAR)

5.4.2.2.2 250 KW PEM stack manufacturing cost summary

FIGURE 32 250 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP
(100 STACKS/YEAR)

FIGURE 33 250 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP
(1,000 STACKS/YEAR)

FIGURE 34 250 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP
(10,000 STACKS/YEAR)

FIGURE 35 250 KW PEM STACK MANUFACTURING COST SUMMARY BREAKUP
(50,000 STACKS/YEAR)

5.4.2.3 PEM BoP cost summary

5.4.2.3.1 100 KW PEM BoP cost summary

FIGURE 36 100 KW PEM BOP COST SUMMARY BREAKUP (100 STACKS/YEAR)

FIGURE 37 100 KW PEM BOP COST SUMMARY BREAKUP (1,000 STACKS/YEAR)

FIGURE 38 100 KW PEM BOP COST SUMMARY BREAKUP (10,000 STACKS/YEAR)

FIGURE 39 100 KW PEM BOP COST SUMMARY BREAKUP (50,000 STACKS/YEAR)

5.4.2.3.2 250 KW PEM BoP cost summary

FIGURE 40 250 KW PEM BOP COST SUMMARY BREAKUP (100 STACKS/YEAR)

FIGURE 41 250 KW PEM BOP COST SUMMARY BREAKUP (1,000 STACKS/YEAR)

FIGURE 42 250 KW PEM BOP COST SUMMARY BREAKUP (10,000 STACKS/YEAR)

FIGURE 43 250 KW PEM BOP COST SUMMARY BREAKUP (50,000 STACKS/YEAR)

5.5 TECHNOLOGY ANALYSIS

5.5.1 ATOMICALLY DISPERSED PT AND FE SITES AND PT-FE NANOPARTICLES
FOR DURABLE PROTON-EXCHANGE MEMBRANE FUEL CELLS

5.5.2 NANOPARTICLE-BASED FUEL CELLS

5.5.3 NON-PRECIOUS METAL CATALYST-BASED FUEL CELLS

5.5.4 HEXAGONAL PEROVSKITES FOR CERAMIC FUEL CELLS

5.6 TRADE ANALYSIS

5.6.1 EXPORT SCENARIO

TABLE 11 EXPORT SCENARIO FOR HS CODE: 280410, BY COUNTRY, 2020–2022
(USD THOUSAND)

FIGURE 44 EXPORT DATA FOR TOP 5 COUNTRIES, 2020–2022 (USD)

5.6.2 IMPORT SCENARIO

TABLE 12 IMPORT SCENARIO FOR HS CODE: 280410, BY COUNTRY, 2020–2022
(USD THOUSAND)

FIGURE 45 IMPORT DATA FOR TOP 5 COUNTRIES, 2020–2022 (USD THOUSAND)

5.7 KEY CONFERENCES AND EVENTS, 2023–2024

TABLE 13 FUEL CELL GENERATOR MARKET: DETAILED LIST OF CONFERENCES
AND EVENTS, 2023–2024

5.8 SUPPLY CHAIN ANALYSIS

FIGURE 46 FUEL CELL GENERATOR SUPPLY CHAIN ANALYSIS

TABLE 14 FUEL CELL GENERATOR MARKET PLAYERS: ROLE IN SUPPLY CHAIN**5.9 MARKET MAPPING****FIGURE 47 FUEL CELL GENERATOR MARKET MAP****5.10 PATENT ANALYSIS****5.10.1 LIST OF MAJOR PATENTS****TABLE 15 FUEL CELL GENERATORS: INNOVATIONS AND PATENT REGISTRATIONS, MARCH 2021–FEBRUARY 2023****5.11 CASE STUDY ANALYSIS****5.11.1 SAMSUNG HEAVY INDUSTRIES PLANS TO DEVELOP CLEAN POWER SHIPS BY JOINING HANDS WITH BLOOM ENERGY****5.11.1.1 Problem statement****5.11.1.2 Solution****5.11.2 SOUTHERN COMMUNICATION SERVICES EMPLOYS PLUG POWER'S HYDROGEN FUEL CELLS FOR UNINTERRUPTED POWER SUPPLY****5.11.2.1 Problem statement****5.11.2.2 Solution****5.11.3 IKEA USES BLOOM ENERGY'S FUEL CELL GENERATORS AS BACKUP SYSTEMS IN POWER GENERATION PLANT****5.11.3.1 Problem statement****5.11.3.2 Solution****5.12 CODES AND REGULATIONS****5.12.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 16 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 17 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 18 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.12.2 REGULATIONS RELATED TO FUEL CELL GENERATORS****5.12.2.1 Regulatory framework in North America****5.12.2.2 Regulatory framework in Europe****5.12.2.3 Regulatory framework in Asia Pacific****5.13 PORTER'S FIVE FORCES ANALYSIS****FIGURE 48 PORTER'S FIVE FORCES ANALYSIS FOR FUEL CELL GENERATOR MARKET****TABLE 19 FUEL CELL GENERATOR MARKET: PORTER'S FIVE FORCES ANALYSIS****5.13.1 THREAT OF SUBSTITUTES****5.13.2 BARGAINING POWER OF SUPPLIERS**

5.13.3 BARGAINING POWER OF BUYERS

5.13.4 THREAT OF NEW ENTRANTS

5.13.5 INTENSITY OF COMPETITIVE RIVALRY

5.14 KEY STAKEHOLDERS AND BUYING CRITERIA

5.14.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 49 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS, BY END USER

TABLE 20 INFLUENCE OF KEY END USERS IN BUYING PROCESS (%)

5.14.2 BUYING CRITERIA

FIGURE 50 KEY BUYING CRITERIA OF KEY END USERS

TABLE 21 KEY BUYING CRITERIA, BY END USER

6 FUEL CELL GENERATOR MARKET, BY FUEL TYPE

6.1 INTRODUCTION

FIGURE 51 FUEL CELL GENERATOR MARKET, BY FUEL TYPE, 2022

TABLE 22 FUEL CELL GENERATOR MARKET, BY FUEL TYPE, 2020–2022 (USD MILLION)

TABLE 23 FUEL CELL GENERATOR MARKET, BY FUEL TYPE, 2023–2030 (USD MILLION)

TABLE 24 PRODUCT AVAILABILITY STATUS OF MARKET PLAYERS, BY FUEL TYPE

6.2 HYDROGEN

6.2.1 HIGH ENERGY DENSITY OF HYDROGEN TO SUPPORT SEGMENTAL GROWTH

6.3 METHANOL

6.3.1 EASE OF STORAGE AND USE TO BOOST DEMAND FOR METHANOL

6.4 AMMONIA

6.4.1 STRINGENT REGULATIONS TO REDUCE CARBON FOOTPRINT TO INCREASE DEMAND FOR AMMONIA

7 FUEL CELL GENERATOR MARKET, BY SIZE

7.1 INTRODUCTION

FIGURE 52 FUEL CELL GENERATOR MARKET, BY SIZE, 2022

TABLE 25 FUEL CELL GENERATOR MARKET, BY SIZE, 2020–2022 (USD MILLION)

TABLE 26 FUEL CELL GENERATOR MARKET, BY SIZE, 2023–2030 (USD MILLION)

TABLE 27 PRODUCT AVAILABILITY STATUS OF MARKET PLAYERS, BY SIZE

7.2 SMALL SCALE (UP TO 200 KW)

7.2.1 DIVERSE POWER OUTPUT OF SMALL FUEL CELL SYSTEMS TO INCREASE THEIR USE BY ALL END USERS

7.3 LARGE SCALE (ABOVE 200 KW)

7.3.1 ROBUST ENERGY AND CLIMATE POLICIES TO DRIVE MARKET

8 FUEL CELL TECHNOLOGIES DEPLOYED IN BACKUP POWER GENERATORS

8.1 INTRODUCTION

8.2 PROTON-EXCHANGE MEMBRANE FUEL CELL (PEMFC)

8.2.1 INCREASING USE OF PEM FUEL CELLS IN MARINE APPLICATIONS

8.3 SOLID OXIDE FUEL CELL (SOFC)

8.3.1 RISING ADOPTION OF SOFCS IN ENERGY SECTOR TO ACHIEVE HIGH ELECTRICAL EFFICIENCY AND LOW CO₂ EMISSIONS

8.4 ALKALINE FUEL CELL (AFC)

8.4.1 HIGH ADOPTION OF AFC IN CONSTRUCTION AND MARINE APPLICATIONS

8.5 PHOSPHORIC ACID FUEL CELL (PAFC)

8.5.1 ADOPTION OF PAFCS IN STATIONARY APPLICATIONS

9 FUEL CELL GENERATOR MARKET, BY END USER

9.1 INTRODUCTION

FIGURE 53 FUEL CELL GENERATOR MARKET, BY END USER, 2022

TABLE 28 FUEL CELL GENERATOR MARKET, BY END USER, 2020–2022 (MW)

TABLE 29 FUEL CELL GENERATOR MARKET, BY END USER, 2023–2030 (MW)

TABLE 30 FUEL CELL GENERATOR MARKET, BY END USER, 2020–2022 (USD MILLION)

TABLE 31 FUEL CELL GENERATOR MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 32 PRODUCT AVAILABILITY STATUS OF MARKET PLAYERS, BY END USER

9.2 MARINE ENGINEERING PLATFORMS

9.2.1 DECARBONIZATION TARGETS SET BY INTERNATIONAL MARITIME ORGANIZATIONS TO STIMULATE DEMAND

9.3 CONSTRUCTION SITES

9.3.1 REPLACEMENT OF DIESEL GENERATORS WITH FUEL CELL GENERATORS TO ACHIEVE DECARBONIZATION GOALS TO DRIVE MARKET

9.4 AGRICULTURAL FACILITIES

9.4.1 IMPLEMENTATION OF HYDROGEN GENERATORS IN AGRICULTURAL APPLICATIONS TO SUPPORT MARKET GROWTH

9.5 AQUACULTURE FACILITIES

9.5.1 RISING NEED FOR ENERGY-EFFICIENT AND LOW-NOISE SOLUTIONS IN AQUACULTURE FACILITIES TO BOOST DEMAND FOR FUEL CELL GENERATORS

9.6 DATA CENTERS

9.6.1 GROWING USE OF BACKUP POWER SYSTEMS DURING OUTAGES TO PUSH DEMAND FOR FUEL CELL GENERATORS

9.7 EMERGENCY RESPONSE GENERATORS

9.7.1 POWER BACKUP REQUIREMENT FROM TELECOM TOWERS TO CONTRIBUTE TO MARKET GROWTH

10 FUEL CELL GENERATOR MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 54 EUROPE TO BE FASTEST-GROWING MARKET FOR FUEL CELL GENERATORS DURING FORECAST PERIOD

FIGURE 55 FUEL CELL GENERATOR MARKET, BY REGION, 2022

TABLE 33 FUEL CELL GENERATOR MARKET, BY REGION, 2020–2022 (MW)

TABLE 34 FUEL CELL GENERATOR MARKET, BY REGION, 2023–2030 (MW)

TABLE 35 FUEL CELL GENERATOR MARKET, BY REGION, 2020–2022 (USD MILLION)

TABLE 36 FUEL CELL GENERATOR MARKET, BY REGION, 2023–2030 (USD MILLION)

10.2 ASIA PACIFIC

FIGURE 56 ASIA PACIFIC: FUEL CELL GENERATOR MARKET SNAPSHOT

TABLE 37 FUEL CELL GENERATOR PROJECTS IN ASIA PACIFIC

10.2.1 ASIA PACIFIC: IMPACT OF RECESSION

10.2.2 CHINA

10.2.2.1 Increasing focus on improving energy efficiency to drive market

10.2.2.2 Macro factors

TABLE 38 CHINA: CO₂ EMISSIONS (TONNES PER CAPITA), 2010–2022

TABLE 39 CHINA: NUMBER OF SHIPS, 2016–2021

10.2.3 INDIA

10.2.3.1 Need for decarbonization of energy sector to support market growth

10.2.3.2 Macro factors

TABLE 40 INDIA: CO₂ EMISSIONS (TONNES PER CAPITA), 2010–2021

10.2.4 JAPAN

10.2.4.1 Rise in use of hydrogen for clean energy to boost demand for fuel cell generators

10.2.4.2 Macro factors

TABLE 41 JAPAN: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2021

TABLE 42 JAPAN: NUMBER OF SHIPS, 2016–2021

10.3 NORTH AMERICA

FIGURE 57 NORTH AMERICA: FUEL CELL GENERATOR MARKET SNAPSHOT

TABLE 43 FUEL CELL TECHNOLOGY-RELATED PROJECTS IN NORTH AMERICA

10.3.1 NORTH AMERICA: IMPACT OF RECESSION

10.3.2 US

10.3.2.1 Growing focus on clean energy generation to boost demand for fuel cell technology

10.3.2.2 Macro factors

TABLE 44 US: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2022

TABLE 45 US: NUMBER OF SHIPS, 2016–2021

10.3.3 CANADA

10.3.3.1 Government grants to run fuel cell technology-based programs to support market growth

10.3.3.2 Macro factors

TABLE 46 CANADA: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2021

10.4 EUROPE

TABLE 47 FUEL CELL TECHNOLOGY-RELATED PROJECTS IN EUROPE

10.4.1 EUROPE: IMPACT OF RECESSION

10.4.2 GERMANY

10.4.2.1 Focus on emission-free transportation to foster requirement for fuel cell technology

10.4.2.2 Macro factors

TABLE 48 GERMANY: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2021

TABLE 49 GERMANY: NUMBER OF SHIPS, 2016–2021

10.4.3 UK

10.4.3.1 Efforts to reduce GHG emissions to stimulate demand for fuel cell technology

10.4.3.2 Macro factors

TABLE 50 UK: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2021

TABLE 51 UK: NUMBER OF SHIPS, 2016–2021

10.4.4 FRANCE

10.4.4.1 Energy transition outlook of French government to facilitate market growth

10.4.4.2 Macro factors

TABLE 52 FRANCE: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2021

TABLE 53 FRANCE: NUMBER OF SHIPS, 2016–2021

10.4.5 REST OF EUROPE

10.5 REST OF THE WORLD (ROW)

10.5.1 MACRO FACTORS

TABLE 54 ROW: CO2 EMISSIONS (TONNES PER CAPITA), 2010–2019

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

FIGURE 58 KEY DEVELOPMENTS IN FUEL CELL GENERATOR MARKET, 2018–2023

11.2 INDUSTRY CONCENTRATION OF KEY PLAYERS, 2022

FIGURE 59 INDUSTRY CONCENTRATION OF KEY PLAYERS, 2022

11.3 MARKET EVALUATION FRAMEWORK

TABLE 55 MARKET EVALUATION FRAMEWORK, 2018–2023

11.4 SEGMENTAL REVENUE ANALYSIS OF TOP MARKET PLAYERS

FIGURE 60 SEGMENTAL REVENUE ANALYSIS, 2017–2022

11.5 COMPETITIVE SCENARIO AND TRENDS

11.5.1 DEALS

TABLE 56 FUEL CELL GENERATOR MARKET: DEALS, 2018–2023

11.5.2 OTHERS

TABLE 57 FUEL CELL GENERATOR MARKET: OTHERS, 2022

11.6 EVALUATION MATRIX FOR KEY PLAYERS

11.6.1 STARS

11.6.2 EMERGING LEADERS

11.6.3 PERVASIVE PLAYERS

11.6.4 PARTICIPANTS

FIGURE 61 FUEL CELL GENERATOR MARKET: EVALUATION MATRIX FOR KEY PLAYERS, 2022

11.7 FUEL CELL GENERATOR MARKET: COMPANY FOOTPRINT

TABLE 58 COMPANY TYPE FOOTPRINT

TABLE 59 COMPANY END USER FOOTPRINT

TABLE 60 COMPANY FUEL TYPE FOOTPRINT

TABLE 61 COMPANY POWER RATING WITH SIZE FOOTPRINT

TABLE 62 COMPANY REGION FOOTPRINT

11.8 EVALUATION MATRIX FOR START-UPS/SMALL AND MEDIUM-SIZED ENTERPRISES (SMES)

11.8.1 PROGRESSIVE COMPANIES

11.8.2 RESPONSIVE COMPANIES

11.8.3 DYNAMIC COMPANIES

11.8.4 STARTING BLOCKS

FIGURE 62 FUEL CELL GENERATOR MARKET: EVALUATION MATRIX FOR START-

UPS/SMES, 2022

11.9 COMPETITIVE BENCHMARKING

TABLE 63 FUEL CELL GENERATOR MARKET: DETAILED LIST OF KEY START-UPS/SMES

TABLE 64 COMPANY TYPE FOOTPRINT: COMPETITIVE BENCHMARKING FOR START-UPS/SMES

TABLE 65 COMPANY FUEL TYPE FOOTPRINT: COMPETITIVE BENCHMARKING FOR START-UPS/SMES

TABLE 66 COMPANY POWER RATING FOOTPRINT: COMPETITIVE BENCHMARKING FOR START-UPS/SMES

TABLE 67 COMPANY END USER FOOTPRINT: COMPETITIVE BENCHMARKING FOR START-UPS/SMES

TABLE 68 COMPANY REGION FOOTPRINT: COMPETITIVE BENCHMARKING FOR START-UPS/SMES

12 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, MNM view)*

12.1 KEY PLAYERS

12.1.1 BLOOM ENERGY

TABLE 69 BLOOM ENERGY: COMPANY OVERVIEW

FIGURE 63 BLOOM ENERGY: COMPANY SNAPSHOT

TABLE 70 BLOOM ENERGY: PRODUCTS OFFERED

TABLE 71 BLOOM ENERGY: DEALS

TABLE 72 BLOOM ENERGY: OTHERS

12.1.2 DOOSAN FUEL CELL CO., LTD.

TABLE 73 DOOSAN FUEL CELL CO., LTD.: COMPANY OVERVIEW

FIGURE 64 DOOSAN FUEL CELL CO., LTD.: COMPANY SNAPSHOT

TABLE 74 DOOSAN FUEL CELL CO., LTD.: PRODUCTS OFFERED

TABLE 75 DOOSAN FUEL CELL CO., LTD.: DEALS

TABLE 76 DOOSAN FUEL CELL CO., LTD.: OTHERS

12.1.3 POWERCELL SWEDEN AB

TABLE 77 POWERCELL SWEDEN AB: COMPANY OVERVIEW

FIGURE 65 POWERCELL SWEDEN AB: COMPANY SNAPSHOT

TABLE 78 POWERCELL SWEDEN AB: PRODUCTS OFFERED

TABLE 79 POWERCELL SWEDEN AB: PRODUCT LAUNCHES

TABLE 80 POWERCELL SWEDEN AB: DEALS

TABLE 81 POWERCELL SWEDEN AB: OTHERS

12.1.4 BALLARD POWER SYSTEMS

TABLE 82 BALLARD POWER SYSTEMS: COMPANY OVERVIEW
FIGURE 66 BALLARD POWER SYSTEMS: COMPANY SNAPSHOT
TABLE 83 BALLARD POWER SYSTEMS: PRODUCTS OFFERED
TABLE 84 BALLARD POWER SYSTEMS: PRODUCT LAUNCHES
TABLE 85 BALLARD POWER SYSTEMS: DEALS
TABLE 86 BALLARD POWER SYSTEMS: OTHERS

12.1.5 NEDSTACK FUEL CELL TECHNOLOGY BV

TABLE 87 NEDSTACK FUEL CELL TECHNOLOGY BV: COMPANY OVERVIEW
TABLE 88 NEDSTACK FUEL CELL TECHNOLOGY BV: PRODUCTS OFFERED
TABLE 89 NEDSTACK FUEL CELL TECHNOLOGY BV: DEALS

12.1.6 PLUG POWER INC.

TABLE 90 PLUG POWER INC.: COMPANY OVERVIEW
FIGURE 67 PLUG POWER INC.: COMPANY SNAPSHOT
TABLE 91 PLUG POWER INC.: PRODUCTS OFFERED

12.1.7 TECO 2030

TABLE 92 TECO 2030: COMPANY OVERVIEW
FIGURE 68 TECO 2030: COMPANY SNAPSHOT
TABLE 93 TECO 2030: PRODUCTS OFFERED
TABLE 94 TECO 2030: DEALS

12.1.8 ABB

TABLE 95 ABB: COMPANY OVERVIEW
FIGURE 69 ABB: COMPANY SNAPSHOT
TABLE 96 ABB: PRODUCTS OFFERED
TABLE 97 ABB: DEALS

12.1.9 LOOP ENERGY INC.

TABLE 98 LOOP ENERGY INC.: COMPANY OVERVIEW
FIGURE 70 LOOP ENERGY INC.: COMPANY SNAPSHOT
TABLE 99 LOOP ENERGY INC.: PRODUCTS OFFERED
TABLE 100 LOOP ENERGY INC.: DEALS

12.1.10 SIEMENS ENERGY

TABLE 101 SIEMENS ENERGY: COMPANY OVERVIEW
FIGURE 71 SIEMENS ENERGY: COMPANY SNAPSHOT
TABLE 102 SIEMENS ENERGY: PRODUCTS OFFERED

12.1.11 CUMMINS INC.

TABLE 103 CUMMINS INC.: BUSINESS OVERVIEW
FIGURE 72 CUMMINS INC.: COMPANY SNAPSHOT
TABLE 104 CUMMINS INC.: PRODUCTS OFFERED
TABLE 105 CUMMINS INC.: DEALS

12.1.12 AFC ENERGY PLC

TABLE 106 AFC ENERGY PLC: BUSINESS OVERVIEW

FIGURE 73 AFC ENERGY PLC: COMPANY SNAPSHOT

TABLE 107 AFC ENERGY PLC: PRODUCTS OFFERED

TABLE 108 AFC ENERGY PLC: DEALS

TABLE 109 AFC ENERGY PLC: OTHERS

12.1.13 TOSHIBA ENERGY SYSTEMS & SOLUTIONS CORPORATION

TABLE 110 TOSHIBA GLOBAL: COMPANY OVERVIEW

FIGURE 74 TOSHIBA ENERGY SYSTEMS & SOLUTIONS CORPORATION:
COMPANY SNAPSHOT

TABLE 111 TOSHIBA ENERGY SYSTEMS & SOLUTIONS CORPORATION:
PRODUCTS OFFERED

TABLE 112 TOSHIBA ENERGY SYSTEMS & SOLUTIONS CORPORATION: DEALS

12.1.14 PROTON MOTOR POWER SYSTEMS PLC

TABLE 113 PROTON MOTOR POWER SYSTEMS PLC: COMPANY OVERVIEW

FIGURE 75 PROTON MOTOR POWER SYSTEMS PLC: COMPANY SNAPSHOT

TABLE 114 PROTON MOTOR POWER SYSTEMS PLC: PRODUCTS OFFERED

TABLE 115 PROTON MOTOR POWER SYSTEMS PLC: DEALS

12.1.15 PANASONIC CORPORATION

TABLE 116 PANASONIC CORPORATION: COMPANY OVERVIEW

FIGURE 76 PANASONIC CORPORATION: COMPANY SNAPSHOT

TABLE 117 PANASONIC CORPORATION: PRODUCTS OFFERED

TABLE 118 PANASONIC CORPORATION: PRODUCT LAUNCHES

TABLE 119 PANASONIC CORPORATION: DEALS

12.1.16 EODEV

TABLE 120 EODEV: BUSINESS OVERVIEW

TABLE 121 EODEV: PRODUCTS OFFERED

TABLE 122 EODEV: DEALS

12.1.17 GENCELL LTD.

TABLE 123 GENCELL LTD.: COMPANY OVERVIEW

FIGURE 77 GENCELL LTD.: COMPANY SNAPSHOT

TABLE 124 GENCELL LTD.: PRODUCTS OFFERED

*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

12.2 OTHER PLAYERS

12.2.1 FUJI ELECTRIC CO., LTD.

12.2.2 POWERUP ENERGY TECHNOLOGIES

12.2.3 TW HORIZON FUEL CELL TECHNOLOGIES

12.2.4 ALTERGY

12.2.5 FREUDENBERG SEALING TECHNOLOGIES GMBH & CO. KG

- 12.2.6 BOC LIMITED
- 12.2.7 H2SYS
- 12.2.8 GAUSSIN
- 12.2.9 YANMAR HOLDINGS CO., LTD

13 APPENDIX

- 13.1 INSIGHTS FROM INDUSTRY EXPERTS
- 13.2 DISCUSSION GUIDE
- 13.3 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 13.4 CUSTOMIZATION OPTIONS
- 13.5 RELATED REPORTS
- 13.6 AUTHOR DETAILS

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