

# **Hydrogen Compressors Market by Lubrication Type (Oil-based, Oil-free), Type (Mechanical, Non-mechanical), Application (Hydrogen Infrastructure, Industrial (Oil Refining, Chemicals & Petrochemicals), Design Region - Global Forecast to 2028**

<https://marketpublishers.com/r/H391555C592CEN.html>

Date: February 2024

Pages: 197

Price: US\$ 4,950.00 (Single User License)

ID: H391555C592CEN

## **Abstracts**

The global hydrogen compressors market is estimated to grow from USD 2.1 billion in 2023 to USD 2.6 billion by 2028; it is expected to record a CAGR of 4.5% during the forecast period. Growing investments in hydrogen-related infrastructure and projects from both the public and private sectors contribute to the growth of the hydrogen compressor industry. These investments accelerate the adoption and commercialization of hydrogen compressor technology. Government subsidies and regulatory frameworks aimed at promoting clean energy technologies further drive the growth of the hydrogen compressor market.

“Oil-based compressor: The largest segment of the hydrogen compressors market, by lubrication type. “

Based on lubrication type, the hydrogen compressors market is split into two segments: oil-based & oil-free. Oil-based compressors dominate the hydrogen compressor industry because they are more efficient than oil-free compressors. Oil-based compressors employ oil as a cooling medium, absorbing around 80% of the heat generated by the compressor during compression, resulting in higher efficiency. They are deemed appropriate for a variety of industrial applications that demand increased compression. The increased investment in the oil and gas sector is expected to raise demand for hydrogen compressors.

“The hydrogen value chain/infrastructure, by end-use application, is expected to be the

fastest growing segment during the forecast period.”

Based on end-use application, the hydrogen compressors market has been split into hydrogen value chain/infrastructure & Industrial application. The hydrogen compressors market for hydrogen value chain/infrastructure is anticipated to be the fastest growing market share over the forecast period. It is further divided into Hydrogen production & storage, Transportation, hydrogen refueling stations, hydrogen fuel cells. There are lot of initiatives & billions of dollars being invested in the market by both government & private companies. For example, The Biden-Harris Administration stated that seven regional clean hydrogen hubs in the United States will receive a total of USD 7 billion in funding. These centers are planned to produce more than three million metric tons of clean hydrogen per year, helping the United States meet its clean hydrogen production goal by 2030. Efforts are being made to construct new hydrogen pipeline networks, with an emphasis on overcoming the specific problems posed by hydrogen's characteristics to pipeline materials and compressor design. One of the major initiatives in Europe is a partnership between Phillips 66 and H2 Energy Europe to build a network of around 250 hydrogen refueling stations by 2026.

“North America is expected to be the second largest growing region in the hydrogen compressor market.”

North America is expected to be the second largest region in the hydrogen compressors market during the forecast period. The region's emphasis on sustainable energy, as well as the increasing usage of hydrogen fuel cell vehicles, are all contributing to market growth. Furthermore, the United States Department of Energy's financing and support for R&D efforts has resulted in multiple patents and new technologies in the market, cementing North America's position as a pioneer in hydrogen compressor production. One of the recent contracts in the region includes collaboration between the National Renewable Energy Laboratory (NREL) and Toyota Motor North America in developing a one-megawatt proton exchange membrane fuel cell system showcases advancements in large-scale power production using hydrogen fuel cells which will lead to need in hydrogen compressors. Companies in the United States have been making investments to increase their market share in the hydrogen compressor sector. This includes the development of improved compressor technologies specifically designed for hydrogen production, transit, and use. Ariel Corporation, Atlas Copco Group, and Burckhardt Compression AG are among the prominent players in the region.

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 and assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 60%, Tier 2- 25%, and Tier 3- 15%

By Designation: C-Level- 35%, Director Level- 25%, and Others- 40%

By Region: North America- 25%, Europe- 25%, Asia Pacific- 30%, South America – 10%, Middle East & Africa – 10%

Note: Others include sales managers, engineers, and regional managers.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The hydrogen compressors market is dominated by a few major players that have a wide regional presence. The leading players in the hydrogen compressors market are Atlas Copco AB (Sweden), Linde plc (Ireland), Siemens Energy (Germany), Air Products and Chemicals, Inc. (US), Ingersoll Rand (US). The major strategy adopted by the players includes new product launches, contracts, agreements, partnerships, joint ventures, acquisitions, and investments & expansions.

#### Research Coverage:

The report defines, describes, and forecasts the global hydrogen compressors market by technology, lubrication type, by design, end-use application and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews 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 hydrogen compressor market.

#### Key Benefits of Buying the Report

Government initiatives at the national and international levels amplify the impact of investment on the electrolyzer market. Robust policy frameworks, often accompanied by financial incentives, subsidies, and regulatory support, encourage widespread adoption of hydrogen compressors for green hydrogen

production. Factors such as high initial cost and lack of infrastructure restrain the growth of the market. The growing energy transition towards renewable energy sources and rapid urbanization are expected to present lucrative opportunities for the players operating in the hydrogen compressor market.

**Product Development/ Innovation:** The new HAUG.Sirius NanoLoc compressor is the first compressor which combines J.P. Sauer & Sohn's high-pressure competence with HAUG Sauer Kompressoren AG's oil-free expertise. The machines are entirely dry-running and hermetically gas-tight and are intended for applications requiring absolute process safety and purity. The compressor, with an ultimate pressure of 450 bar, allows for oil-free compression of nearly any gas.

**Market Development:** Atlas Copco Compressors is partnering with Hoffman & Hoffman to develop a new distributor agreement for Atlas Copco's whole line of industrial process cooling solutions. Hoffman & Hoffman will exclusively represent the product line throughout South Carolina, North Carolina, Virginia, and Tennessee.

**Market Diversification:** Investments by Ingersoll Rand in India. Ingersoll Rand, a global leader in mission-critical flow creation and industrial technologies, is investing in its Indian operations to promote expanded technological innovation, hydrogen compressor manufacture and testing, and manufacturing capacity development. At its world-class manufacturing site in Naroda, Gujarat, it has introduced energy-efficient Heat-of-compression (HOC) dryers.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players, like include as Atlas Copco AB (Sweden), Linde plc (Ireland), Siemens Energy (Germany), Air Products and Chemicals, Inc. (US), Ingersoll Rand (US), among others in the hydrogen compressor market.

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\*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)\* might not be captured in case of unlisted companies.

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