

# **Hydrogen Fueling Station Market by Supply Type, Station Size (Small Stations, Mid-Sized Stations, Large Stations), Station Type (Fixed Hydrogen Stations, Mobile Hydrogen Stations), Pressure, Solution (EPC, Components) and Region - Global Forecast to 2030**

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## **Abstracts**

The global hydrogen fueling station market is estimated to grow from USD 380 Million in 2023 to USD 1,129 Million by 2030; it is expected to record a CAGR of 16.8% during the forecast period. Increasing initiatives to curb the green house gas emissions from the mobility sector leads to an increase in the demand for the renewable hydrogen fuel which drives the hydrogen fueling station market.

“Off-site: The segment is expected to account for the largest market share of the hydrogen fueling station market in 2022, by supply type “

Based on supply type, the hydrogen fueling station market has been split into two types: off-site and on-site. The off-site were estimated to have the largest market share of the hydrogen fueling station market in 2022. The growth of the off-site segment can be attributed by the rapid development of technological methods for the delivery of hydrogen through pipelines and carriers.

“High Pressure segment is expected to dominate the hydrogen fueling station market based on pressure”

By pressure, the hydrogen fueling station market has been segmented into high pressure and low pressure. The high pressure segment is expected to hold the largest share of the hydrogen fueling station market in 2022 and grow at faster rate during the forecast period. Rising trends in shared mobility and increased demand for the light duty

vehicles especially fuel cell passenger cars is expected to drive the growth of high pressure segment.

“By Solution, the engineering, procurement and construction (EPC) segment is expected to be the fastest growing market during the forecast period.”

Based on Solution, the hydrogen fueling station market is segmented into engineering, procurement and construction (EPC), and components. The engineering, procurement and construction (EPC) segment is expected to be the fastest-growing segment during the forecast period. The key factors such as growing adoption of fuel cell vehicles and rising construction of hydrogen fueling station is expected to drive the EPC segment during the forecast period.

Europe is expected to be the second fastest-growing region in the hydrogen fueling station market

Europe is expected to be the second fastest hydrogen fueling station market during the forecast period. Several factors contribute to this growth, including population growth, urbanization, and rising standards of living. As a result, the government is working towards the mitigation of carbon emissions which leads to increasing investment of generating hydrogen from renewables to achieve carbon neutral future. These are few of key factors expected to fuel the growth of the hydrogen fueling station market 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, as well as to 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 Levels- 25%, and Others- 40%

By Region: Asia Pacific- 30%, Europe- 25%, North America- 25%, the Middle East & Africa- 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 hydrogen fueling station market is dominated by a few major players that have a wide regional presence. The leading players in the hydrogen fueling station market are Air Liquide (France), Air Products and Chemicals, Inc. (US), Linde plc (Ireland), Nel ASA (Norway), and McPhy Energy S.A. (France).

#### Research Coverage:

The report defines, describes, and forecasts the global hydrogen fueling station market, by station size, supply type, pressure, station type, solution, 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 hydrogen fueling station market.

#### Key Benefits of Buying the Report

Growing adoption of fuel cell vehicles and increasing public and private investments in hydrogen fueling station deployment are some of the main factors driving the hydrogen fueling station market. Factors such as significant initial investments requirements to construct a hydrogen refueling station and the underdeveloped hydrogen infrastructure in some countries still restrain the market. Increased government mandates for upgrading hydrogen fueling stations and growing initiatives to accelerate hydrogen deployment provide opportunities for the hydrogen fueling station market to grow. Even though safety measures and risk assessment in hydrogen fueling station are major challenges faced impacting the growth of hydrogen fueling station market.

**Product Development/ Innovation:** The future of the hydrogen fueling station market looks bright as they become less expensive due to improvements in onsite supply type especially through electrolysis method. The electrolysis provides clean hydrogen for fueling vehicles. Additionally, the safety and risk assessed is low in onsite hydrogen supply through electrolysis as compared to off-site.

**Market Development:** Renewable energy sources are becoming increasingly

important in the hydrogen infrastructure. Renewables include sources such as solar, wind, hydro, geothermal, and biomass, among others. The Asia Pacific (MEA) hydrogen fueling station market is expected to experience significant growth in the coming years, driven by increasing investments in green hydrogen projects and the development of new hydrogen fueling infrastructure.

**Market Diversification:** McPhy Energy S.A. launched “Augmented McFilling” hydrogen fueling station. It can be used to power the heavy duty hydrogen powered vehicles. It reduces the customer’s operating costs and environmental impact.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players like Air Liquide (France), Air Products and Chemicals, Inc. (US), Linde plc (Ireland), Nel ASA (Norway), and McPhy Energy S.A. (France) among others in the hydrogen fueling station market

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 DEFINITION

#### 1.3 INCLUSIONS AND EXCLUSIONS

##### 1.3.1 HYDROGEN FUELING STATION MARKET, BY STATION SIZE

##### 1.3.2 HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE

##### 1.3.3 HYDROGEN FUELING STATION MARKET, BY PRESSURE

##### 1.3.4 HYDROGEN FUELING STATION MARKET, BY STATION TYPE

##### 1.3.5 HYDROGEN FUELING STATION MARKET, BY SOLUTION

##### 1.3.6 HYDROGEN FUELING STATION MARKET, BY REGION

#### 1.4 MARKET SCOPE

##### 1.4.1 MARKET SEGMENTATION

##### 1.4.2 GEOGRAPHIC SCOPE

##### 1.4.3 YEARS CONSIDERED

#### 1.5 CURRENCY CONSIDERED

#### 1.6 LIMITATIONS

#### 1.7 STAKEHOLDERS

#### 1.8 IMPACT OF RECESSION

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

##### FIGURE 1 HYDROGEN FUELING STATION 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 primary interviews

##### FIGURE 3 BREAKDOWN OF PRIMARIES

#### 2.3 MARKET SIZE ESTIMATION

##### 2.3.1 BOTTOM-UP APPROACH

##### FIGURE 4 HYDROGEN FUELING STATION MARKET: BOTTOM-UP APPROACH

##### 2.3.2 TOP-DOWN APPROACH

##### FIGURE 5 HYDROGEN FUELING STATION MARKET: TOP-DOWN APPROACH

### 2.3.3 DEMAND-SIDE METRICS

FIGURE 6 METRICS CONSIDERED TO ANALYZE DEMAND FOR HYDROGEN FUELING STATIONS

2.3.3.1 Assumptions for demand-side analysis

2.3.3.2 Calculations for demand-side analysis

### 2.3.4 SUPPLY-SIDE ANALYSIS

FIGURE 7 KEY METRICS CONSIDERED FOR ASSESSING SUPPLY OF HYDROGEN FUELING STATIONS

FIGURE 8 HYDROGEN FUELING STATION MARKET: SUPPLY-SIDE ANALYSIS

2.3.4.1 Assumptions and calculations for supply side

FIGURE 9 HYDROGEN FUELING STATION MARKET: MARKET SHARE ANALYSIS

## 2.4 FORECAST

## 2.5 IMPACT OF RECESSION

## 3 EXECUTIVE SUMMARY

TABLE 1 HYDROGEN FUELING STATION MARKET SNAPSHOT

FIGURE 10 SMALL STATIONS SEGMENT TO CAPTURE LARGEST MARKET SHARE, BY STATION SIZE, DURING FORECAST PERIOD

FIGURE 11 HIGH PRESSURE SEGMENT TO DOMINATE HYDROGEN FUELING STATION MARKET, BY PRESSURE, DURING FORECAST PERIOD

FIGURE 12 ON-SITE SEGMENT TO LEAD HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, DURING FORECAST PERIOD

FIGURE 13 FIXED HYDROGEN STATIONS SEGMENT TO REGISTER HIGHER CAGR IN HYDROGEN FUELING STATION MARKET, BY STATION TYPE, DURING FORECAST PERIOD

FIGURE 14 COMPONENTS SEGMENT TO ACCOUNT FOR LARGER SHARE OF HYDROGEN FUELING STATION MARKET, BY SOLUTION, DURING FORECAST PERIOD

FIGURE 15 ASIA PACIFIC ACCOUNTED FOR LARGEST SHARE OF HYDROGEN FUELING STATION MARKET IN 2022

## 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN HYDROGEN FUELING STATION MARKET

FIGURE 16 GROWING ADOPTION OF FUEL CELL ELECTRIC VEHICLES TO DRIVE HYDROGEN FUELING STATION MARKET DURING 2023–2030

4.2 HYDROGEN FUELING STATION MARKET, BY PRESSURE

FIGURE 17 HIGH PRESSURE SEGMENT TO ACCOUNT FOR LARGER SHARE OF HYDROGEN FUELING STATION MARKET, BY PRESSURE, IN 2030

4.3 HYDROGEN FUELING STATION MARKET, BY STATION SIZE

FIGURE 18 SMALL STATIONS SEGMENT TO HOLD LARGEST SHARE HYDROGEN FUELING STATION MARKET, BY STATION SIZE, IN 2030

4.4 HYDROGEN FUELING STATION MARKET, BY STATION TYPE

FIGURE 19 FIXED HYDROGEN STATIONS SEGMENT DOMINATED HYDROGEN FUELING STATION MARKET, BY STATION TYPE, IN 2030

4.5 HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE

FIGURE 20 ON-SITE SEGMENT TO HOLD LARGER SHARE OF HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, IN 2030

4.6 HYDROGEN FUELING STATION MARKET, BY SOLUTION

FIGURE 21 COMPONENTS SEGMENT TO DOMINATE HYDROGEN FUELING STATION MARKET, BY SOLUTION, IN 2030

4.7 HYDROGEN FUELING STATION MARKET, BY REGION

FIGURE 22 ASIA PACIFIC TO BE FASTEST-GROWING HYDROGEN FUELING STATION MARKET DURING FORECAST PERIOD

4.8 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE & COUNTRY

FIGURE 23 HIGH PRESSURE & JAPAN DOMINATED HYDROGEN FUELING STATION MARKET IN ASIA PACIFIC, BY PRESSURE & COUNTRY, RESPECTIVELY, IN 2022

## **5 MARKET OVERVIEW**

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 24 HYDROGEN FUELING STATION MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Growing private and public investments in hydrogen fueling station deployment

5.2.1.2 Growing adoption of fuel cell electric vehicles

5.2.2 RESTRAINTS

5.2.2.1 Significant initial investment requirements

5.2.2.2 Underdeveloped hydrogen infrastructure

5.2.3 OPPORTUNITIES

5.2.3.1 Government initiatives to accelerate deployment of hydrogen fueling stations

5.2.4 CHALLENGES



- 5.2.4.1 Risk assessment and safety measures for fueling stations
- 5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS
  - 5.3.1 REVENUE SHIFTS AND NEW REVENUE POCKETS FOR PROVIDERS OF HYDROGEN FUELING STATIONS
  - FIGURE 25 REVENUE SHIFTS FOR HYDROGEN FUELING STATION PROVIDERS
- 5.4 SUPPLY CHAIN ANALYSIS
  - FIGURE 26 HYDROGEN FUELING STATION MARKET: SUPPLY CHAIN ANALYSIS
  - 5.4.1 COMPONENT MANUFACTURERS
  - 5.4.2 HYDROGEN FUELING STATION PROVIDERS
  - 5.4.3 END USERS
- TABLE 2 LIST OF COMPANIES AND THEIR ROLE IN HYDROGEN FUELING STATION ECOSYSTEM
- 5.5 ECOSYSTEM MAPPING
  - FIGURE 27 HYDROGEN FUELING STATION MARKET MAP
- 5.6 TECHNOLOGY ANALYSIS
  - 5.6.1 DELIVERED GASEOUS HYDROGEN SYSTEMS
  - 5.6.2 ON-SITE HYDROGEN GENERATION
  - 5.6.3 DELIVERED LIQUID HYDROGEN SYSTEMS
- 5.7 PATENT ANALYSIS
  - 5.7.1 LIST OF MAJOR PATENTS
  - TABLE 3 HYDROGEN FUELING STATION: INNOVATIONS AND PATENT REGISTRATIONS, JUNE 2016–NOVEMBER 2022
- 5.8 TARIFF AND REGULATORY FRAMEWORK
  - 5.8.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
  - TABLE 4 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
  - TABLE 5 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
  - TABLE 6 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
  - 5.8.2 REGULATORY FRAMEWORK
  - TABLE 7 REGULATORY FRAMEWORK: HYDROGEN FUELING STATION MARKET, BY REGION
  - 5.8.3 REGULATORY CODES RELATED TO HYDROGEN FUELING STATIONS
- 5.9 KEY CONFERENCES AND EVENTS, 2023 & 2024
  - TABLE 8 HYDROGEN FUELING STATION MARKET: DETAILED LIST OF CONFERENCES AND EVENTS
- 5.10 TRADE ANALYSIS



### 5.10.1 HS CODE 280410

#### 5.10.1.1 Export scenario

TABLE 9 EXPORT SCENARIO FOR HS CODE 280410, BY COUNTRY, 2019–2021 (USD)

FIGURE 28 EXPORT DATA FOR TOP FIVE COUNTRIES, 2019–2021 (USD)

#### 5.10.1.2 Import scenario

TABLE 10 IMPORT SCENARIO FOR HS CODE 280410, BY COUNTRY, 2019–2021 (USD)

FIGURE 29 IMPORT DATA FOR TOP 5 COUNTRIES, 2019–2021 (USD)

### 5.11 INDICATIVE PRICING ANALYSIS, BY SOLUTION

TABLE 11 OFF-SITE INDICATIVE PRICING ANALYSIS, BY COMPONENT

TABLE 12 OFF-SITE INDICATIVE PRICING ANALYSIS, BY EPC

TABLE 13 ON-SITE INDICATIVE PRICING ANALYSIS, BY COMPONENT

TABLE 14 ON-SITE INDICATIVE PRICING ANALYSIS, BY EPC

### 5.12 CASE STUDY ANALYSIS

5.12.1 SHELL APPOINTED AUDUBON TO SHOWCASE ITS EXPERTISE IN ENGINEERING, PROCUREMENT AND CONSTRUCTION SERVICES

#### 5.12.1.1 Problem statement

#### 5.12.1.2 Solution

5.12.2 EMERSON PROVIDED FUEL FLOW CONTROL SYSTEM FOR HYDROGEN FUELING STATIONS

#### 5.12.2.1 Problem statement

#### 5.12.2.2 Solution

### 5.13 PORTER'S FIVE FORCES ANALYSIS

FIGURE 30 PORTER'S FIVE FORCES ANALYSIS FOR HYDROGEN FUELING STATION MARKET

TABLE 15 HYDROGEN FUELING STATION 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 31 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END USERS

TABLE 16 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END USERS

#### 5.14.2 BUYING CRITERIA

FIGURE 32 KEY BUYING CRITERIA FOR TOP THREE END USERS

TABLE 17 KEY BUYING CRITERIA FOR TOP THREE END USERS

## 6 HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE

### 6.1 INTRODUCTION

FIGURE 33 HYDROGEN FUELING STATION MARKET SHARE, BY SUPPLY TYPE, 2022

TABLE 18 HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)

### 6.2 ON-SITE

TABLE 19 ON-SITE: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 6.2.1 ELECTROLYSIS

6.2.1.1 Increasing demand for pure hydrogen to propel utilization of electrolyzers for hydrogen production

#### 6.2.2 STEAM METHANE REFORMING (SMR)

6.2.2.1 Need for cost-efficient hydrogen production to lead to adoption of SMR

### 6.3 OFF-SITE

TABLE 20 OFF-SITE: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 6.3.1 GAS

6.3.1.1 Need for cost-efficient storage and dispensing of hydrogen to boost segment growth

#### 6.3.2 LIQUID

6.3.2.1 Economies of scale achieved through transportation of liquid hydrogen to drive segment

## 7 HYDROGEN FUELING STATION MARKET, BY STATION TYPE

### 7.1 INTRODUCTION

FIGURE 34 HYDROGEN FUELING STATION MARKET SHARE, BY STATION TYPE, 2022

TABLE 21 HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 7.2 FIXED HYDROGEN STATIONS

7.2.1 GOVERNMENT INVESTMENTS AND INITIATIVES TO DEPLOY HYDROGEN FUELING STATIONS TO SUPPORT MARKET GROWTH

TABLE 22 FIXED HYDROGEN STATIONS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

### 7.3 MOBILE HYDROGEN STATIONS

7.3.1 GROWING DEMAND FOR PORTABLE FUELING UNITS TO POWER FUEL CELL VEHICLES TO FUEL MARKET EXPANSION

TABLE 23 MOBILE HYDROGEN STATIONS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

## 8 HYDROGEN FUELING STATION MARKET, BY STATION SIZE

### 8.1 INTRODUCTION

FIGURE 35 HYDROGEN FUELING STATION MARKET SHARE, BY STATION SIZE, 2022

TABLE 24 HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)

### 8.2 SMALL STATIONS

8.2.1 COST-EFFICIENT OPERATIONS OF SMALL STATIONS TO FUEL DEMAND IN EMERGING MARKETS

TABLE 25 SMALL STATIONS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

### 8.3 MID-SIZED STATIONS

8.3.1 FOCUS ON DECARBONIZING TRANSPORTATION SECTOR TO DRIVE MARKET GROWTH

TABLE 26 MID-SIZED STATIONS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

### 8.4 LARGE STATIONS

8.4.1 FOCUS ON ADVANCING HYDROGEN INFRASTRUCTURE TO PROPEL DEMAND FOR LARGE HYDROGEN STATIONS

TABLE 27 LARGE STATIONS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

## 9 HYDROGEN FUELING STATION MARKET, BY PRESSURE

### 9.1 INTRODUCTION

FIGURE 36 HYDROGEN FUELING STATION MARKET SHARE, BY PRESSURE, 2022

TABLE 28 HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

### 9.2 LOW PRESSURE

### 9.2.1 RISING DEMAND FOR FUEL CELL BUSES AND TRUCKS TO BOOST SEGMENTAL LANDSCAPE

TABLE 29 LOW PRESSURE: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

### 9.3 HIGH PRESSURE

#### 9.3.1 GROWING DEMAND FOR HYDROGEN-POWERED LIGHT-DUTY VEHICLES TO BOOST MARKET

TABLE 30 HIGH PRESSURE: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

## 10 HYDROGEN FUELING STATION MARKET, BY SOLUTION

### 10.1 INTRODUCTION

FIGURE 37 HYDROGEN FUELING STATION MARKET SHARE, BY SOLUTION, 2022

TABLE 31 HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

### 10.2 EPC

#### 10.2.1 GOVERNMENT INVESTMENTS AND INITIATIVES TO DEPLOY HYDROGEN FUELING STATIONS TO INDUCE DEMAND FOR EPC SOLUTIONS

TABLE 32 EPC: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

TABLE 33 EPC: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

#### 10.2.2 BY SITE ENGINEERING & DESIGN

TABLE 34 SITE ENGINEERING & DESIGN: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.2.3 BY PERMITTING

TABLE 35 PERMITTING: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.2.4 BY CONSTRUCTION

TABLE 36 CONSTRUCTION: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.2.5 BY COMMISSIONING

TABLE 37 COMMISSIONING: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.2.6 BY PROJECT MANAGEMENT & GENERAL OVERHEAD

TABLE 38 PROJECT MANAGEMENT & GENERAL OVERHEAD: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

### 10.3 COMPONENTS

TABLE 39 COMPONENTS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

TABLE 40 COMPONENTS: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)

#### 10.3.1 HYDROGEN INLETS

10.3.1.1 Off-site generation of hydrogen to induce demand for hydrogen inlets

TABLE 41 HYDROGEN INLETS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.2 COMPRESSORS

10.3.2.1 Rising demand for simple storage and distribution of hydrogen to generate demand for compressors

TABLE 42 COMPRESSORS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.3 HYDRAULIC POWER UNITS AND CONTROLS

10.3.3.1 Adoption of control devices for safe operation of hydrogen fueling stations to boost market

TABLE 43 HYDRAULIC POWER UNITS & CONTROLS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.4 DISPENSING CHILLER SYSTEMS

10.3.4.1 Increasing demand for short refueling time to boost demand for chiller systems

TABLE 44 DISPENSING CHILLER SYSTEMS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.5 STORAGE UNITS

10.3.5.1 Growing demand for storage of hydrogen in various forms to generate demand for storage units

TABLE 45 STORAGE UNITS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.6 DISPENSERS

10.3.6.1 Need for accurate pressure and controlled flow rate in hydrogen fueling stations to propel demand for dispensers

TABLE 46 DISPENSERS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

#### 10.3.7 OTHERS

TABLE 47 OTHERS: HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

## 11 HYDROGEN FUELING STATION MARKET, BY REGION

## 11.1 INTRODUCTION

FIGURE 38 ASIA PACIFIC ACCOUNTED FOR LARGEST SHARE OF HYDROGEN FUELING STATION MARKET IN 2022

FIGURE 39 HYDROGEN FUELING STATION MARKET, BY REGION, 2022

TABLE 48 HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (USD MILLION)

TABLE 49 HYDROGEN FUELING STATION MARKET, BY REGION, 2021–2030 (UNITS)

## 11.2 ASIA PACIFIC

FIGURE 40 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET SNAPSHOT

11.2.1 ASIA PACIFIC: RECESSION IMPACT

11.2.2 BY STATION SIZE

TABLE 50 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)

11.2.3 BY PRESSURE

TABLE 51 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

11.2.4 BY STATION TYPE

TABLE 52 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

11.2.5 BY SUPPLY TYPE

TABLE 53 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)

11.2.6 BY SOLUTION

TABLE 54 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

TABLE 55 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY EPC SOLUTION, 2021–2030 (USD MILLION)

TABLE 56 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)

11.2.7 BY COUNTRY

TABLE 57 ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY COUNTRY, 2021–2030 (USD MILLION)

11.2.7.1 China

11.2.7.1.1 Targets for carbon neutrality to foster market growth

TABLE 58 CHINA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 59 CHINA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.2.7.2 Japan

11.2.7.2.1 Government initiatives intended to achieve carbon neutrality to stimulate market growth

TABLE 60 JAPAN: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 61 JAPAN: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.2.7.3 South Korea

11.2.7.3.1 Growing investments in hydrogen technology to drive market

TABLE 62 SOUTH KOREA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 63 SOUTH KOREA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.2.7.4 New Zealand

11.2.7.4.1 Government initiatives to promote hydrogen technology research & development to push market growth

TABLE 64 NEW ZEALAND: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 65 NEW ZEALAND: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.2.7.5 Australia

11.2.7.5.1 Focus on large-scale production of green hydrogen to favor market growth

TABLE 66 AUSTRALIA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 67 AUSTRALIA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.2.7.6 Rest of Asia Pacific

TABLE 68 REST OF ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 69 REST OF ASIA PACIFIC: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

## 11.3 EUROPE

FIGURE 41 EUROPE: HYDROGEN FUELING STATION MARKET SNAPSHOT

### 11.3.1 EUROPE: RECESSION IMPACT

### 11.3.2 BY STATION SIZE

TABLE 70 EUROPE: HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)

### 11.3.3 BY PRESSURE



TABLE 71 EUROPE: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

11.3.4 BY STATION TYPE

TABLE 72 EUROPE: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

11.3.5 BY SUPPLY TYPE

TABLE 73 EUROPE: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)

11.3.6 BY SOLUTION

TABLE 74 EUROPE: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

TABLE 75 EUROPE: HYDROGEN FUELING STATION MARKET, BY EPC SOLUTION, 2021–2030 (USD MILLION)

TABLE 76 EUROPE: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)

11.3.7 BY COUNTRY

TABLE 77 EUROPE: HYDROGEN FUELING STATION MARKET, BY COUNTRY, 2021–2030 (USD MILLION)

11.3.7.1 Germany

11.3.7.1.1 Increasing deployment of hydrogen fueling stations to power passenger trains to accelerate market growth

TABLE 78 GERMANY: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 79 GERMANY: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

11.3.7.2 France

11.3.7.2.1 Presence of key market players to foster market expansion

TABLE 80 FRANCE: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 81 FRANCE: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

11.3.7.3 Netherlands

11.3.7.3.1 Favorable government strategies for FCVs to accelerate market growth

TABLE 82 NETHERLANDS: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 83 NETHERLANDS: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

11.3.7.4 Switzerland

11.3.7.4.1 Rising government initiatives to spur market growth

TABLE 84 SWITZERLAND: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 85 SWITZERLAND: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

#### 11.3.7.5 UK

11.3.7.5.1 Allocation of funds for deployment of hydrogen fueling stations to boost market growth

TABLE 86 UK: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 87 UK: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

#### 11.3.7.6 Rest of Europe

TABLE 88 REST OF EUROPE: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 89 REST OF EUROPE: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

### 11.4 NORTH AMERICA

#### 11.4.1 NORTH AMERICA: RECESSION IMPACT

#### 11.4.2 BY STATION SIZE

TABLE 90 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)

#### 11.4.3 BY PRESSURE

TABLE 91 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

#### 11.4.4 BY STATION TYPE

TABLE 92 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

#### 11.4.5 BY SUPPLY TYPE

TABLE 93 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)

#### 11.4.6 BY SOLUTION

TABLE 94 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

TABLE 95 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY EPC SOLUTION, 2021–2030 (USD MILLION)

TABLE 96 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)

#### 11.4.7 BY COUNTRY

TABLE 97 NORTH AMERICA: HYDROGEN FUELING STATION MARKET, BY

**COUNTRY, 2021–2030 (USD MILLION)****11.4.7.1 US**

11.4.7.1.1 Ongoing large-scale projects to stimulate market growth

**TABLE 98 US: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)****TABLE 99 US: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)****11.4.7.2 Canada**

11.4.7.2.1 Government support to transition to zero-emission technology to spur market growth

**TABLE 100 CANADA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)****TABLE 101 CANADA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)****11.5 MIDDLE EAST & AFRICA****11.5.1 MIDDLE EAST & AFRICA: RECESSION IMPACT****11.5.2 BY STATION SIZE****TABLE 102 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)****11.5.3 BY PRESSURE****TABLE 103 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)****11.5.4 BY STATION TYPE****TABLE 104 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)****11.5.5 BY SUPPLY TYPE****TABLE 105 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)****11.5.6 BY SOLUTION****TABLE 106 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)****TABLE 107 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY EPC SOLUTION, 2021–2030 (USD MILLION)****TABLE 108 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)****11.5.7 BY COUNTRY****TABLE 109 MIDDLE EAST & AFRICA: HYDROGEN FUELING STATION MARKET, BY COUNTRY, 2021–2030 (USD MILLION)****11.5.7.1 UAE**

11.5.7.1.1 Development of balanced hydrogen strategy for expanding use of hydrogen in transport applications to propel market growth

TABLE 110 UAE: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 111 UAE: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

#### 11.5.7.2 Saudi Arabia

11.5.7.2.1 Growing private investments in hydrogen economy to spur market growth

TABLE 112 SAUDI ARABIA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD MILLION)

TABLE 113 SAUDI ARABIA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD MILLION)

#### 11.5.7.3 Rest of the Middle East & Africa

### 11.6 SOUTH AMERICA

#### 11.6.1 SOUTH AMERICA: RECESSION IMPACT

#### 11.6.2 BY STATION SIZE

TABLE 114 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY STATION SIZE, 2021–2030 (USD MILLION)

#### 11.6.3 BY PRESSURE

TABLE 115 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD THOUSAND)

#### 11.6.4 BY STATION TYPE

TABLE 116 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD THOUSAND)

#### 11.6.5 BY SUPPLY TYPE

TABLE 117 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY SUPPLY TYPE, 2021–2030 (USD MILLION)

#### 11.6.6 BY SOLUTION

TABLE 118 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY SOLUTION, 2021–2030 (USD MILLION)

TABLE 119 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY EPC SOLUTION, 2021–2030 (USD MILLION)

TABLE 120 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY COMPONENT, 2021–2030 (USD MILLION)

#### 11.6.7 BY COUNTRY

TABLE 121 SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY COUNTRY, 2021–2030 (USD MILLION)

#### 11.6.7.1 Brazil

11.6.7.1.1 Focus on development of hydrogen economy to support market growth

TABLE 122 BRAZIL: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD THOUSAND)

TABLE 123 BRAZIL: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD THOUSAND)

11.6.7.2 Rest of South America

TABLE 124 REST OF SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY PRESSURE, 2021–2030 (USD THOUSAND)

TABLE 125 REST OF SOUTH AMERICA: HYDROGEN FUELING STATION MARKET, BY STATION TYPE, 2021–2030 (USD THOUSAND)

11.6.7.2.1 Argentina

11.6.7.2.2 Colombia and Costa Rica

## **12 COMPETITIVE LANDSCAPE**

### 12.1 OVERVIEW

FIGURE 42 KEY DEVELOPMENTS IN HYDROGEN FUELING STATION MARKET, 2019–2023

12.2 MARKET SHARE ANALYSIS OF KEY PLAYERS, 2022

FIGURE 43 SHARE ANALYSIS OF TOP PLAYERS IN HYDROGEN FUELING STATION MARKET, 2022

12.3 MARKET EVALUATION FRAMEWORK

TABLE 126 MARKET EVALUATION FRAMEWORK, 2019–2023

12.4 REVENUE ANALYSIS OF TOP MARKET PLAYERS

FIGURE 44 REVENUE ANALYSIS, 2017–2021

12.5 COMPETITIVE SCENARIOS AND TRENDS

12.5.1 DEALS

TABLE 127 HYDROGEN FUELING STATION MARKET: DEALS, 2019–2023

12.5.2 PRODUCT LAUNCHES

TABLE 128 HYDROGEN FUELING STATION MARKET: PRODUCT LAUNCHES, 2019–2023

12.5.3 OTHERS

TABLE 129 HYDROGEN FUELING STATION MARKET: OTHERS, 2019–2023

12.6 COMPANY EVALUATION QUADRANT, 2022

12.6.1 STARS

12.6.2 EMERGING LEADERS

12.6.3 PERVASIVE PLAYERS

12.6.4 PARTICIPANTS

FIGURE 45 HYDROGEN FUELING STATION MARKET: KEY COMPANY EVALUATION QUADRANT, 2022

12.7 COMPANY PRODUCT FOOTPRINT ANALYSIS  
TABLE 130 COMPONENT FOOTPRINT: KEY PLAYERS  
TABLE 131 PRESSURE FOOTPRINT: KEY PLAYERS  
TABLE 132 SUPPLY TYPE FOOTPRINT: KEY PLAYERS  
TABLE 133 STATION TYPE FOOTPRINT: KEY PLAYERS  
TABLE 134 STATION SIZE FOOTPRINT: KEY PLAYERS  
TABLE 135 REGION FOOTPRINT: KEY PLAYERS

12.8 START-UPS/SMES EVALUATION QUADRANT, 2022

12.8.1 PROGRESSIVE COMPANIES

12.8.2 RESPONSIVE COMPANIES

12.8.3 DYNAMIC COMPANIES

12.8.4 STARTING BLOCKS

FIGURE 46 HYDROGEN FUELING STATION MARKET: START-UPS/SMES  
EVALUATION QUADRANT, 2022

12.9 COMPETITIVE BENCHMARKING

TABLE 136 HYDROGEN FUELING STATION MARKET: DETAILED LIST OF KEY  
START-UPS/SMES

TABLE 137 COMPONENT FOOTPRINT: START-UPS

TABLE 138 PRESSURE FOOTPRINT: START-UPS

TABLE 139 SUPPLY TYPE FOOTPRINT: START-UPS

TABLE 140 STATION TYPE FOOTPRINT: START-UPS

TABLE 141 STATION SIZE FOOTPRINT: START-UPS

TABLE 142 REGION FOOTPRINT: START-UPS

## **13 COMPANY PROFILES**

(Business overview, Products/Services/Solutions offered, Recent developments & MnM  
View)\*

13.1 KEY PLAYERS

13.1.1 AIR LIQUIDE

TABLE 143 AIR LIQUIDE: BUSINESS OVERVIEW

FIGURE 47 AIR LIQUIDE: COMPANY SNAPSHOT

TABLE 144 AIR LIQUIDE: PRODUCT LAUNCHES

TABLE 145 AIR LIQUIDE: DEALS

TABLE 146 AIR LIQUIDE: OTHERS

13.1.2 NEL ASA

TABLE 147 NEL ASA: BUSINESS OVERVIEW

FIGURE 48 NEL ASA: COMPANY SNAPSHOT

TABLE 148 NEL ASA: DEALS

## TABLE 149 NEL ASA: OTHERS

## 13.1.3 LINDE PLC

## TABLE 150 LINDE PLC: BUSINESS OVERVIEW

## FIGURE 49 LINDE PLC: COMPANY SNAPSHOT

## TABLE 151 LINDE PLC: DEALS

## TABLE 152 LINDE PLC: OTHERS

## 13.1.4 AIR PRODUCTS AND CHEMICALS, INC.

## TABLE 153 AIR PRODUCTS AND CHEMICALS, INC.: BUSINESS OVERVIEW

## FIGURE 50 AIR PRODUCTS AND CHEMICALS, INC.: COMPANY SNAPSHOT

## TABLE 154 AIR PRODUCTS AND CHEMICALS, INC.: DEALS

## TABLE 155 AIR PRODUCTS AND CHEMICALS, INC.: OTHERS

## 13.1.5 MCPHY ENERGY S.A.

## TABLE 156 MCPHY ENERGY S.A.: BUSINESS OVERVIEW

## FIGURE 51 MCPHY ENERGY S.A.: COMPANY SNAPSHOT

## TABLE 157 MCPHY ENERGY S.A.: PRODUCT LAUNCHES

## TABLE 158 MCPHY ENERGY S.A.: DEALS

## TABLE 159 MCPHY ENERGY S.A.: OTHERS

## 13.1.6 IWATANI CORPORATION

## TABLE 160 IWATANI CORPORATION: BUSINESS OVERVIEW

## FIGURE 52 IWATANI CORPORATION: COMPANY SNAPSHOT

## TABLE 161 IWATANI CORPORATION: DEALS

## 13.1.7 INGERSOLL RAND

## TABLE 162 INGERSOLL RAND: BUSINESS OVERVIEW

## FIGURE 53 INGERSOLL RAND: COMPANY SNAPSHOT

## TABLE 163 INGERSOLL RAND: DEALS

## TABLE 164 INGERSOLL RAND: OTHERS

## 13.1.8 CHART INDUSTRIES

## TABLE 165 CHART INDUSTRIES: BUSINESS OVERVIEW

## FIGURE 54 CHART INDUSTRIES: COMPANY SNAPSHOT

## TABLE 166 CHART INDUSTRIES: DEALS

## 13.1.9 PERIC HYDROGEN TECHNOLOGIES CO., LTD

## TABLE 167 PERIC HYDROGEN TECHNOLOGIES CO., LTD: BUSINESS OVERVIEW

## TABLE 168 PERIC HYDROGEN TECHNOLOGIES CO., LTD.: DEALS

## 13.1.10 H2 MOBILITY

## TABLE 169 H2 MOBILITY: BUSINESS OVERVIEW

## TABLE 170 H2 MOBILITY: DEALS

## TABLE 171 H2 MOBILITY: OTHERS

## 13.1.11 PDC MACHINES

## TABLE 172 PDC MACHINES: BUSINESS OVERVIEW



TABLE 173 PDC MACHINES: DEALS

13.1.12 SERA GMBH

TABLE 174 SERA GMBH: BUSINESS OVERVIEW

13.1.13 HYDROGENIOUS LOHC TECHNOLOGIES

TABLE 175 HYDROGENIOUS LOHC TECHNOLOGIES: BUSINESS OVERVIEW

TABLE 176 HYDROGENIOUS LOHC TECHNOLOGIES: DEALS

TABLE 177 HYDROGENIOUS LOHC TECHNOLOGIES: OTHERS

13.1.14 POWERTECH LABS INC.

TABLE 178 POWERTECH LABS INC.: BUSINESS OVERVIEW

TABLE 179 POWERTECH LABS INC.: PRODUCT LAUNCHES

13.1.15 HYDROGEN REFUELING SOLUTIONS

TABLE 180 HYDROGEN REFUELING SOLUTIONS: BUSINESS OVERVIEW

13.1.16 GALILEO TECHNOLOGIES S.A.

TABLE 181 GALILEO TECHNOLOGIES S.A.: BUSINESS OVERVIEW

TABLE 182 GALILEO TECHNOLOGIES S.A.: PRODUCT LAUNCHES

TABLE 183 GALILEO TECHNOLOGIES S.A.: OTHERS

\*Details on Business overview, Products/Services/Solutions offered, Recent developments & MnM View might not be captured in case of unlisted companies.

13.2 OTHER PLAYERS

13.2.1 NIKOLA CORPORATION

13.2.2 HUMBLE HYDROGEN

13.2.3 ATAWAY

13.2.4 NANOSUN LIMITED

## **14 APPENDIX**

14.1 INSIGHTS FROM INDUSTRY EXPERTS

14.2 DISCUSSION GUIDE

14.3 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.4 CUSTOMIZATION OPTIONS

14.5 RELATED REPORTS

14.6 AUTHOR DETAILS

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