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Research Report on Hydrogen Manufacturing and Hydrogen Refueling Station Industry in China, 2016-2030

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Abstracts

A fuel cell electric vehicle (FCEV) is a non-polluting vehicle that is powered by electricity generated from the vehicle's stored high-pressure hydrogen and ambient air. These vehicles use hydrogen as an energy source and generate electricity from a fuel cell system. This technology has the potential to be applied across the industry because of the unlimited storage of hydrogen as a fuel on the earth and the eco-friendly nature of the energy production process.

The biggest advantage of FCEVs over pure electric and plug-in hybrid vehicles is that hydrogen refueling usually takes only 3 minutes and the range can easily reach over 600 km. At the same time, hydrogen energy has the advantages of abundant sources, wide range of uses, high calorific value, light total weight and environmental virtues, etc., but is currently subject to greater infrastructure constraints.

In addition, the FCEV policy is favorable in the long term, and the scale of FCEV is accelerating. With the launch of FCEV demonstration and point evaluation, the total subsidy scale of fuel cell industry has saw a significant increase. With the demonstrative city point and subsidy, the total subsidy amount of Chinese government will exceed CNY 4 billion (USD 620 million) per year with reference to the existing range of subsidized cities, and the industry scale will also increase significantly, driving the whole scale of industry chain to 10,000 units.

In China, local auto manufacturers have been launching FCEVs in succession. Among them, SAIC Group presented early in the field of hydrogen fuel cells, launching Rongwei 950 fuel cell passenger car in 2016, which stands for the first fuel cell passenger car to complete the announcement, sales and licensing in China. Great Wall Motor's first fuel

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cell vehicle type based on an exclusive platform was scheduled to be demonstrated in 2020. Geely Automobile, for its part, will launch a mass-production model with hydrogen fuel cells in 2025.

In 2020, global sales of FCEVs amounted to a total of 9,006, down 9.1% YOY. The sales of the U.S. and China witnessed approximately 50% decrease, only 937 (down 55% YOY) and 1177(down 57% YOY) respectively. Unlike the U.S., which was disturbed by the epidemic, China's downturn in sales was mainly due to the shift in government subsidies and the development of demonstration city clusters.

In terms of hydrogen refueling stations, there were 553 hydrogen refueling stations worldwide by the end of 2020, including 107 new stations compared to 2019. 515 stations are open for service to the public and the rest are used for buses or within enterprises, etc., and are not open to the public. Among them, Asia accounts for 49.73% of the world's hydrogen refueling stations with 275 stations, followed by Europe with 36.16% of hydrogen refueling stations, reaching 200 stations. There are 6 countries with more than 30 hydrogen refueling stations in the world, among which Japan has the largest number of hydrogen refueling stations with 142 stations, followed by Germany with 100 stations and China with 69 stations. The total number of hydrogen refueling stations in Japan, Germany and China is 311, accounting for 62% of the world, and these three countries are in the absolute leading position in hydrogen energy development. By the end of 2020, 80 hydrogen refueling stations had been put into operation in China, and these stations are mainly concentrated in Beijing-Tianjin-Hebei, Yangtze River Delta and Pearl River Delta regions. It is expected that 1,000 stations will be built by 2030. By the end of 2020, China had more than 7,000 FCEVs, making it the country with the largest number of fuel cell commercial vehicles in the world, which were mainly used in the Yangtze River Delta, Pearl River Delta and Beijing-Tianjin regions.

With the guidance of policy and market, China's hydrogen and fuel cell vehicles will be on the fast track. It is expected that by 2025, the number of fuel cell vehicles in China will reach 100,000. With reference to the development process of new energy vehicles, fuel cell vehicles will form a good industrial chain after the implementation of the 'demonstrative application' policy, and are expected to see an explosion of production and sales around 2025.

Topics covered:

Economic and Policy Environment of Hydrogen Manufacturing and Refueling Station Market

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What is the impact of COVID-19 on the hydrogen manufacturing and refueling station market in China?

Analysis on major hydrogen manufacturing and refueling station companies in China

Key drivers and market opportunities for hydrogen manufacturing and refueling stations

What are the key drivers, challenges, and opportunities for hydrogen manufacturing and refueling stations during the forecast period 2022-2030?

Which are the key players in the global and Chinese hydrogen manufacturing and refueling stations market and what are the reasons for their success?

What is the expected revenue of China’s hydrogen manufacturing and refueling station market during the forecast period 2022-2030?

What are the strategies adopted by the key players in the market to increase their market share in this industry?

Which segment of the hydrogen manufacturing and refueling stations market is expected to dominate the market in 2030?

What is the competitive landscape of the hydrogen manufacturing and refueling stations market in China?

What are the major detrimental factors restraining the growth of the hydrogen manufacturing and refueling stations market in China?

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