

Planar Solid Oxide Fuel Cell Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By End-User (Commercial, Data Centers, and Others), By Application (Stationary, Transportation, Portable) By Region, Competition 2018-2028

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Abstracts

Global Planar Solid Oxide Fuel Cell Market has valued at USD 1.55 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.22 % through 2028. A planar solid oxide fuel cell (SOFC) is a type of solid oxide fuel cell that generates electricity through an electrochemical process using a solid electrolyte. Unlike traditional fuel cells that use liquid electrolytes, SOFCs use solid materials, typically ceramics, as electrolytes.

In a planar SOFC, the fuel (typically hydrogen or hydrocarbon-based fuels) is oxidized at the anode, releasing electrons. These electrons travel through an external circuit, producing electrical power, and then combine with oxygen ions from the air at the cathode to form water vapor. The key characteristic of planar SOFCs is their flat, thin, and layered design, which facilitates efficient power generation at high operating temperatures (typically between 500°C and 1000°C). The global planar solid oxide fuel cell market encompasses the production, sales, and deployment of planar SOFCs and related technologies. This market has been driven by the growing demand for clean and efficient energy solutions in various sectors, including: Planar SOFCs have the potential to provide high-efficiency, low-emission power generation solutions for both stationary and distributed power applications. SOFCs are explored for use in electric vehicles (fuel cell vehicles) and auxiliary power units for long-range commercial transportation. SOFCs can be integrated into industrial processes and combined heat and power

(CHP) systems to increase energy efficiency and reduce greenhouse gas emissions. SOFCs can be used for residential and commercial heating applications, offering efficient and clean space heating and hot water generation. Planar SOFCs are considered for various military and aerospace applications due to their compact size and high energy density. SOFCs are suitable for providing reliable power in remote locations and as backup power sources in critical infrastructure. The growth of the planar SOFC market is influenced by factors such as government incentives, environmental regulations, advancements in materials and manufacturing techniques, and increasing awareness of the benefits of clean and efficient energy generation. Additionally, partnerships and collaborations between fuel cell manufacturers and end-users play a crucial role in the market's expansion.

Key Market Drivers

Increasing Demand for Clean Energy

The growing concern over environmental issues and the need to reduce greenhouse gas emissions have led to a rising demand for clean and sustainable energy solutions. Planar SOFCs, known for their high efficiency and low emissions, are well-positioned to meet this demand. Planar SOFCs are highly efficient energy conversion devices, with the potential to reach efficiency levels of up to 60% or more. This efficiency makes them attractive for various applications, including power generation, transportation, and cogeneration systems. Governments and industries are increasingly focused on improving energy security by diversifying energy sources. Planar SOFCs can play a role in achieving energy security by providing reliable and on-site power generation solutions. Many governments around the world offer incentives, subsidies, and grants to promote the development and adoption of clean energy technologies, including fuel cells. These incentives can significantly boost the planar SOFC market. Ongoing research and development efforts have led to advancements in SOFC materials and manufacturing techniques. These advancements have reduced costs, improved performance, and increased the commercial viability of planar SOFCs. The electrification of the transportation sector, including electric vehicles (EVs) and hydrogen fuel cell vehicles, has driven interest in SOFCs as potential power sources for transportation applications. Planar SOFCs offer benefits in terms of range, refueling time, and efficiency.

Distributed Energy Generation

The trend toward distributed energy generation and microgrids is creating opportunities

for planar SOFCs. They can be deployed in decentralized energy systems, providing electricity and heat to homes, businesses, and remote areas. The need for reliable backup power solutions in the face of natural disasters and grid disruptions has spurred interest in planar SOFCs as backup power sources for critical infrastructure and residential applications. Planar SOFCs are being explored for use in aerospace and military applications due to their high energy density, compact size, and potential for providing power in remote and demanding environments. Collaboration between fuel cell manufacturers, research institutions, and end-users has facilitated the development and commercialization of planar SOFCs for various applications.

It's important to note that the planar SOFC market is dynamic, and new drivers may have emerged since my last update. Additionally, market conditions can vary by region and application. To gain a comprehensive understanding of the current state of the global planar SOFC market and its drivers, it is recommended to consult industry reports, market research, and news sources for the most up-to-date information.

Increasing Stringency of Government Regulations

The increasing stringency of government regulations, coupled with a rise in the energy prices, is one of the key trends being observed in the planar solid oxide fuel cell market. With the surging awareness on alternative energy sources, combustion-based electricity generators are being replaced by renewable energy systems such as solar panels, which display a higher efficiency in energy conversion. In addition, the fuel cells used in these devices do not cause any harmful emissions, owing to which these are suitable for applications in transportation, stationary/backup, and portable power applications.

Moreover, the increasing application base of such products in the oil and gas industry offers lucrative opportunities for growth to the market. For instance, the natural gas extracted on-site can be readily used as a fuel for direct fuel cell (DFC) power plants. With this, the power generated at the DFC power plants can be utilized to support the extraction process. In addition, DFC power plants serve as a clean source of energy and can provide power which can be injected underground for enhanced oil recovery. Therefore, the global solid oxide fuel cell market has numerous opportunities for growth in the coming years.

Key Market Challenges

As of September 2022, the global planar solid oxide fuel cell (SOFC) market faced several challenges. These challenges may have evolved or changed since then, but

they provide insight into the typical obstacles the industry has encountered. Here are some key challenges in the global planar SOFC market. High Operating Temperatures: Planar SOFCs typically operate at high temperatures, often exceeding 500°C. These high operating temperatures can lead to materials degradation, increase manufacturing complexity, and limit the range of materials that can be used.

Costs and Manufacturing Scalability

The initial capital costs for planar SOFCs have been relatively high. Achieving cost competitiveness with other energy technologies, such as natural gas combined-cycle power plants, remains a significant challenge. Additionally, scaling up manufacturing processes to meet market demand while maintaining quality and consistency is challenging. Ensuring the long-term durability and reliability of planar SOFCs under various operating conditions is a critical challenge. The high temperatures and thermal cycling can lead to degradation of cell materials, affecting performance and lifespan. The widespread adoption of planar SOFCs for transportation and stationary power generation depends on the availability of suitable fuels, such as hydrogen or natural gas. Developing and maintaining fuel supply infrastructure can be a challenge in some regions.

Electrolyte Materials & Competition with Other Energy Technologies

The development of high-performance and durable electrolyte materials that can operate at lower temperatures is an ongoing challenge. Reducing the required operating temperature can improve durability and lower manufacturing costs. Integrating individual planar SOFC stacks into larger systems, including balance-of-plant components and control systems, can be complex. Achieving seamless integration and optimizing system performance are challenges. The regulatory landscape, including safety standards and emissions regulations, can impact the deployment and adoption of planar SOFCs. Policy support, incentives, and market access are critical for market growth. Planar SOFCs face competition from other clean energy technologies, such as photovoltaics, wind, and lithium-ion batteries. These technologies may have advantages in certain applications or market segments.

Key Market Trends

Advancements in Materials and Manufacturing Techniques

Advancements in materials science and manufacturing techniques have been

fundamental to the development of planar SOFCs. Researchers have focused on discovering and designing new materials for electrodes, electrolytes, and interconnects. These materials advancements have improved performance, reduced manufacturing costs, and increased the reliability of SOFCs. For instance, the development of new ceramic materials for electrolytes has allowed for lower operating temperatures, mitigating thermal stress and enhancing durability. This trend toward more robust materials is critical for extending the lifespan of SOFCs and making them more cost competitive.

Fuel Flexibility and Hydrogen Production

One of the significant trends in the planar SOFC market is the pursuit of greater fuel flexibility. While hydrogen remains a primary fuel source for SOFCs, research and development efforts are focused on expanding the range of compatible fuels. This includes the use of hydrocarbons, biofuels, and ammonia. Additionally, SOFCs are being explored for their potential to produce hydrogen through high-temperature electrolysis. This 'co-electrolysis' process can convert water and carbon dioxide into hydrogen and carbon monoxide, which can then be used as fuels or feedstocks for various industries. Hydrogen production is gaining importance in the context of the global hydrogen economy.

Fuel Cell Hybrid Systems

Hybrid energy systems that combine planar SOFCs with other energy technologies are becoming increasingly popular. These hybrid systems aim to maximize energy efficiency, increase system reliability, and ensure a continuous power supply. Key combinations include SOFCs paired with batteries, solar panels, and even microturbines. In such hybrid setups, planar SOFCs serve as the primary power generation source, while batteries provide energy storage for peak demand periods and solar panels contribute during daylight hours. The integration of different technologies offers the benefit of a constant and stable power supply, reducing reliance on the grid.

Distributed Energy Generation and Microgrids

The trend toward distributed energy generation and microgrids is driving the adoption of planar SOFCs in decentralized energy systems. These systems can be deployed at or near the point of use, providing electricity and heat to residential, commercial, and industrial areas. Planar SOFCs are well-suited for microgrid applications due to their high efficiency and ability to provide combined heat and power (CHP). Microgrids

powered by SOFCs enhance grid resilience, particularly in areas prone to grid outages or extreme weather events. They offer the potential for energy self-sufficiency and reduce reliance on centralized power infrastructure.

Data Centers and Backup Power & Lowering Operating Temperatures

The increasing reliance on data centers and the critical need for uninterrupted power supply have led to the adoption of planar SOFCs as primary and backup power sources. These fuel cells can provide highly reliable and efficient power for data center operations, reducing the risk of data loss and downtime during power disruptions. The quick startup times and long runtimes of planar SOFCs make them suitable for use as backup power systems for various critical applications, including healthcare facilities, telecommunications, and emergency response centers. Operating at high temperatures has been a challenge for planar SOFCs due to materials degradation and manufacturing complexity. A significant trend in the market is the ongoing effort to reduce the operating temperatures of SOFCs while maintaining their efficiency. Lowering operating temperatures enhances the durability and lifespan of SOFCs, reduces thermal stress on materials, and simplifies system integration. This trend aligns with the broader goal of making SOFCs more accessible and versatile for various applications.

Segmental Insights

End Use Insights

The data center market is expected to grow, in the forecast period, and along with-it power backup systems market is expected to grow too. 33% of the data centers outage is caused by power outages, and a power outage costs a lot of money to data centers operated. High efficiency, large capacity, and continuous power generation capability have made planar solid oxide fuel cells a preferable choice for power backup and voltage variations. India is one of the fastest-growing economies in the world, and it is likely to boost the growth of public cloud-based data centers. The IT industry dominates the Indian market as the largest private-sector employer in the country, where data centers are widely used, thereby propelling the planar solid oxide fuel cells market growth. There has been a massive increase in research and pilot testing of usage of planar solid oxide fuel cells in data centers. Therefore, with an increase in internet usage, and ongoing research on planar solid oxide fuel cells, the market is expected to grow in the forecast period.

Regional Insights

The Asia Pacific region has established itself as the leader in the Global Planar Solid Oxide Fuel Cell Market with a significant revenue share in 2022. Asia-Pacific has dominated the planar solid oxide fuel cell market growth in 2019, and is expected to continue its dominance in terms of market growth in the coming years as well. The region is expected to see an unprecedented increase during the forecast period. Japan is leading in the region with vast applications of fuel cells, ranging from backup services for data centers, combined heat and power for homes, and many more. This is expected to provide significant market growth for planar solid oxide fuel cell market. China has also witnessed a rise in its hyper-scale platforms, owing to which providing data center services for Chinese hyper-scale platforms have become necessary. China has 50 internet users per 100 population, indicating scope for a lot of development and the connectivity ecosystem and thereby driving the planar solid oxide fuel cells market. Therefore, the aforementioned factors are expected to drive the market in the forecast period, similar to the trend witnessed in recent years.

Key Market Players

Bloom Energy

Ceres Power

Solid Power

FuelCell Energy

Siemens Energy

Ultra Electronics

Atrex Energy

Ceramic Fuel Cells Limited

Kyocera

Versa Power Systems

Report Scope:

In this report, the Global Planar Solid Oxide Fuel Cell Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Planar Solid Oxide Fuel Cell Market, By End Use :

Commercial

Data Centers

Others

Global Planar Solid Oxide Fuel Cell Market, By Application:

Stationary

Portable

Transport

Global Planar Solid Oxide Fuel Cell Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

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Planar Solid Oxide Fuel Cell Market.

Available Customizations:

Global Planar Solid Oxide Fuel Cell Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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