

Diaphragm Hydrogen Compressor Market Size and Forecast (2021 - 2034), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Lubricated, Oil-free), End User [Power Plants, Oil and Gas, Food and Beverages, Petrochemical and Chemical, Hydrogen Fueling Stations, Hydrogen Storage (Tube Trailers), Others], and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)

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Abstracts

The Diaphragm Hydrogen Compressor Market size was valued at US\$ 363.53 million in 2025 and is expected to reach US\$ 551.83 million by 2034; it is estimated to record a CAGR of 4.7% during 2026–2034.

Demand for oil and gas has increased across both developed and developing countries, driving higher levels of production activity along with greater investment and research and development efforts. For example, in January 2023, the CEO of the National Iranian Oil Company (NIOC) stated at a conference on enhanced recovery from oil and gas wells that the company had invested US\$1 billion in developing the joint Sohrab field in Khuzestan Province. He also noted plans to collaborate with local firms to improve the efficiency of 600–700 underperforming wells. Similarly, in April 2022, China National Offshore Oil Corporation (CNOOC) reported the successful implementation of China's first large-scale offshore super-heavy thermal oil recovery development model. In April 2023, Oil and Natural Gas Corporation (ONGC) secured around US\$7 billion in funding

to support oil and gas production over the next three to four years. In Indonesia, the government has actively supported the growth of the Enhanced Oil Recovery (EOR) sector through policies and regulations encouraging adoption of EOR technologies. In September 2021, Indonesia's Energy Minister Arifin Tasrif outlined plans to raise production to 1 million barrels per day, supported by strategies such as optimizing existing reserves, accelerating EOR deployment, expanding exploration, and developing unconventional resources. Collectively, these developments are increasing demand for hydrogen compressors within the oil and gas sector, thereby supporting market growth.

At the same time, governments in the United States and Canada are advancing hydrogen as a central element of their long-term energy transition strategies. On June 5, 2023, the Biden-Harris Administration introduced the National Clean Hydrogen Strategy and Roadmap, establishing a framework to accelerate hydrogen production, distribution, storage, and end-use, while supporting goals of a carbon-free power sector by 2035 and net-zero emissions by 2050. Canada released its Hydrogen Strategy in December 2020, aiming to position itself as a global leader in low-carbon hydrogen production and export in line with its 2050 net-zero target. More recently, in August 2024, Canada's Minister of Energy and Natural Resources announced a US\$9.14 million investment to advance clean hydrogen innovation, including funding for a University of British Columbia pilot project using pyrolysis technology and a hydrogen hybrid demonstration project by Enbridge Gas Inc. in Ontario. These initiatives are expected to strengthen hydrogen infrastructure and generate opportunities for compressor manufacturers. Overall, the North American diaphragm hydrogen compressor market is experiencing steady growth, supported by favorable policies, technological progress, and expanding adoption of hydrogen-based applications across industries.

In 2023, the United States ranked as the second-largest center for manufacturing and industrial output globally, after China. The manufacturing sector generated approximately US\$2,900 billion and contributed over 12% to the country's GDP. To sustain and enhance this level of industrial growth, continued investment in hydrogen infrastructure expansion is essential, which is expected to drive demand for hydrogen compressors. Much of the existing infrastructure in the US is aging and requires modernization and capacity upgrades, particularly in sectors such as oil and gas, energy, refining, petrochemicals, and aviation. As investments increase to upgrade these industries, hydrogen demand as a transition fuel is also expected to rise. In addition, expanding upstream and downstream oil and gas operations, along with growing government-led power generation and transmission projects, are further

supporting market growth. Hydrogen compressors are also widely used in energy storage systems in nuclear power facilities and industrial manufacturing applications.

The US government has committed around US\$50 billion to developing a Clean Hydrogen Economy and plans to establish seven regional clean hydrogen hubs. Hydrogen compressors play a key role in electricity storage systems for nuclear power plants and industrial operations. In March 2022, the US Department of Energy announced US\$750 million in funding for hydrogen production research and development to support clean hydrogen initiatives. This investment was later increased to US\$1.5 billion in 2022 to help reduce the cost of clean hydrogen production, with additional support coming from private-sector initiatives such as Plug Power Inc.'s R&D programs.

In Canada, the government introduced a federal budget in April 2023 allocating approximately US\$12.6 billion toward clean hydrogen investments from 2023 to 2035. According to the Canadian Association for Petroleum Producers, upstream oil and gas investments reached US\$29.4 billion in 2023, recovering beyond pre-pandemic levels. Hydrogen compressors are used in oil and gas refineries for gas compression processes. The Fraser Institute notes that the oil and gas sector contributes about 8% to Canada's GDP and represents a major source of tax revenue, making it a key driver of national economic activity and employment.

Canada's stable economy, advanced infrastructure, and strong technology adoption further support its position as a favorable market for hydrogen technologies. The government continues to implement supportive policies aimed at strengthening domestic industrial production. As one of the world's leading oil and gas producers, Canada is home to roughly 1,000 exploration and production companies. According to the Canadian Centre for Energy Information, capital investment in the power sector reached US\$80 billion in 2022, with oil and gas extraction accounting for US\$31.9 billion of total energy sector spending. Increasing infrastructure investments in these sectors are expected to boost hydrogen adoption as a transition fuel, thereby driving demand for hydrogen fueling stations and supporting growth in the diaphragm hydrogen compressor market.

Atlas Copco AB; Fluitron, Inc.; Gardner Denver Nash, LLC; Burckhardt Compression AG; HAUG Sauer Kompressoren AG; Howden Group; NEUMAN & ESSER GROUP; Hydro-Pac, Inc.; Lenhardt & Wagner GmbH; PDC Machines Inc.; Sundyne; and Ariel Corporation are among the key diaphragm hydrogen compressor market players that are profiled in this market study.

The overall diaphragm hydrogen compressor market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the diaphragm hydrogen compressor market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the diaphragm hydrogen compressor market.

Reason to buy

Saves and reduces time required for identifying the market growth, size, leading players, and segments in the global Diaphragm Hydrogen Compressor market.

Highlights key business priorities to assist companies in realigning their business strategies

Emphasizes key findings and recommendations that uncover emerging industry trends in the global Diaphragm Hydrogen Compressor market, enabling stakeholders across the value chain to craft effective long-term strategies

Develop/modify business expansion plans by analyzing substantial growth prospects in mature and emerging markets

Scrutinizes in-depth global Diaphragm Hydrogen Compressor market trends, along with factors driving the market, as well as those hindering it

Enhances the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution

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