

**Automotive Fuel Cell Market by Vehicle Type (Buses, Trucks, LCVs, Passenger Cars), Component, Fuel Cell Type, Fuel Type, Hydrogen Fuel Points, Operating Miles, Power Capacity, Specialized Vehicle Type and Region - Global forecast to 2030**

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**Report description:**

The global automotive fuel cell market is projected to grow from 25 thousand units in 2022 to 724 thousand units by 2030, registering a CAGR of 52.4%. Fuel cell operated vehicles such as buses, LCVs, passenger cars, and trucks, were mapped as part of this research. The growing demand of zero-emission commercial freight trucks and buses have accelerated the growth of long range fuel cell vehicles. The rapid setup of hydrogen infrastructure worldwide the demand for FCEVs is also expected to increase gradually. Technological breakthroughs in fuel cell components and other technologies have made it possible to have longer range and high-power engines in fuel cell electric vehicles (FCEVs). This will create a shift in demand for FCEVs in the coming years. The automotive fuel cell market is dominated by established players such as Ballard Power Systems (Canada), Toyota Motor Corporation (Japan), Hyundai Group (South Korea), Hyster Yale (US), Plug Power (US), among others These players have worked on providing offerings for the fuel cell ecosystem. They have initiated partnerships to develop their technology and provide best-in-class products to their customers.

"251-500 miles range segment to be the largest segment in market during the forecast period"

The 251-500 miles segment is currently the largest because its high range in a single filling is the primary reason for buying FCEVs over other EVs. Most fuel-cell vehicles currently available in the market are under this range. Above 500 miles is an upcoming segment due to OEMs working on improving range beyond earlier limits. As technology keeps developing and the size of fuel cells decreases, FC vehicles will be able to cover a larger range on a single filling. This is the reason for above 500 miles to be the fastest-growing segment in the future. The 251-500 miles segment is projected to be the largest during the forecast period. This segment includes FCEV passenger cars and some smaller buses and trucks. The 2021 Honda Clarity comes with a range of 360 miles on a single filling. Similarly, 2021 Toyota Mirai Limited and 2021 Toyota Mirai XLE come with 357- and 402-miles range,

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respectively. Toyota provides number of offers including USD 15,000 worth of free fuel for Toyota Mirai. Hyundai Nexo and Hyundai Nexo Blue come with a range of 354 and 380 miles, respectively. Riversimple Movement is available with a range of 300 miles in a single filling. The 2021 Chevrolet Colorado LCV comes with a range of ~250 miles. In July 2020, Hyundai expanded its Xcient fuel-cell trucks in Singapore. In March 2022, Toyota launched India's first FCEV Mirai. The sedan has been launched in the country as part of pilot project which is being conducted by the International Center for Automotive Technology along with Toyota Kirloskar Motor Pvt. Ltd. for studying as well as evaluating the Toyota Mirai on Indian roads. Union transport Road Transport ministry has launched the pilot project for Mirai hydrogen-based advanced FCEV. Toyota and BMW have entered into a partnership for producing hydrogen fuel-cell vehicles, which will allow BMW to achieve its target of 50% electrification across its line-up 2 years ahead of its expected the year 2030. BMW aims to sell hydrogen fuel-cell vehicles as soon as 2025. The car has an estimated range of 300 miles in full hydrogen tanks. Thus, the development of FCEV by various automakers will drive the market. Over the past few years, many OEMs have been making technological advancements to increase the range of their FCEVs. For instance, the 2018 version of Toyota Mirai used to offer a range of 312 miles, whereas the 2023 version is expected to come with a range of 402 miles.

"<150 kW segment to lead demand for automotive fuel cell electric vehicles during the forecast period"

The <150 kW segment is estimated to be the largest during the forecast period. Currently, most fuel-cell vehicle models use a fuel-cell stack with <150 kW power output. Passenger cars contribute to the largest share of the automotive fuel cell market. Most fuel-cell car models use fuel-cell stacks with an output power of less than 150 kW. Hence, the segment is estimated to be the largest. Meanwhile, the greater than 150-250 kW segment is projected to be the fastest as the demand for heavy-duty fuel cells will grow in the future due to the reduced fuel costs of these vehicles. For automotive applications, fuel cells of <150 kW power output are used in passenger cars, some buses, LCVs, trucks, and industrial vehicles. Some vehicles use fuel cells of less than 100 kW power output coupled with an extra battery. For instance, the 2023 Hyundai Nexo's fuel-cell output is 95 kW, and it is coupled with a battery of 40 kW-total power output of 135 kW. In these vehicles, fuel cells are used together with batteries. A new concept of plug-in fuel-cell electric vehicles has come into the market, increasing the demand for this segment in the coming years. This uses electric plug-in charging and hydrogen engine together to power the vehicle. The application of less than 150-kW fuel cells is higher as the sales of fuel-cell passenger cars currently contribute to the largest market. Other vehicles delivering power less than 150 kW are passenger cars like the Toyota Mirai, Audi HTron, Riversimple RASA, among others. Bus and truck models delivering power less than 150 kW are the Quantron QHM, Solaris Urbino 12, Tata Starbus, among others. Besides Mercedes-Benz GLC F-Cell, all fuel-cell car models available in the market have a power output range of less than 150 kW. Many of the LCVs and buses from European manufacturers such as Van Hool, Wrightbus, and Solaris have fuel-cell stacks with an output power of <150 kW. Therefore, the <150 kW segment is projected to have the largest market share during the forecast period. In May 2022, AirDgas and Hyzon Motors signed an agreement to pilot a heavy-duty hydrogen fuel-cell truck that includes 100-kW fuel cell. The Hyzon 100-kW fuel cell, which Airgas has piloted will be displayed at Advanced Clean Transportation Expo. Similarly, in September 2022, Cummins launched hydrogen fuel-cell engine at IAA. Designed to the performance, duty cycle, as well as packaging requirements of medium and heavy-duty trucks as well as buses, the fuel-cell technology having availability in 135kW. Furthermore, in September 2022, Iveco Group and Hyundai Motor Company launched the eDaily FCEV prototype equipped with Hyundai's 90-kW hydrogen fuel-cell system as well as 140-kW e-motor. The 2023 Toyota Mirai model operates on a hydrogen fuel cell and delivers a power of 128 kW with a range of up to 402 miles.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

-□By Company Type: Tier I - 67%, Tier II and Tier III - 9%, and OEMs - 24%

-□By Designation: CXOs - 33%, Managers - 52%, Executives - 15%

-□By Region: North America - 28%, Europe - 34%, Asia Oceania - 38%

The automotive fuel cell vehicle market is dominated by established players such as Ballard Power Systems (Canada), Toyota Motor Corporation (Japan), Hyundai Group (South Korea), Hyster Yale (US), Plug Power (US), among others. They have worked on providing offerings for the automotive fuel cell vehicle ecosystem. They have initiated partnerships to develop their automotive

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fuel cell vehicle technology and offer best-in-class products to their customers.

#### Research Coverage:

The report covers the automotive fuel cell vehicle market based on vehicle type, component, specialized vehicle type, operating miles, power output, hydrogen fuel points, fuel cell type and region (North America, Europe, and Asia- Oceania). It covers the competitive landscape and company profiles of the major players in the automotive fuel cell vehicle ecosystem.

The study also includes an in-depth competitive analysis of the key market players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

#### Key Benefits of Buying the Report:

- This report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the overall automotive fuel cell vehicle ecosystem and its subsegments.
- This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.
- This report will also help stakeholders understand the market's pulse and provide information on key market drivers, restraints, challenges, and opportunities.

#### Table of Contents:

1□INTRODUCTION□	35
1.1□STUDY OBJECTIVES□	35
1.2□MARKET DEFINITION□	36
TABLE 1□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY COMPONENT□	36
TABLE 2□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY VEHICLE TYPE□	37
TABLE 3□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY SPECIALIZED VEHICLE TYPE□	37
TABLE 4□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY POWER OUTPUT□	38
TABLE 5□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY OPERATING MILES□	38
TABLE 6□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY FUEL CELL TYPE□	38
TABLE 7□AUTOMOTIVE FUEL CELL MARKET DEFINITION, BY FUEL TYPE□	39
1.2.1□INCLUSIONS AND EXCLUSIONS□	40
TABLE 8□INCLUSIONS AND EXCLUSIONS□	40
1.3□MARKET SCOPE□	41
FIGURE 1□MARKETS COVERED□	41
1.3.1□REGIONAL SCOPE□	41
1.3.2□YEARS CONSIDERED□	42
1.4□CURRENCY CONSIDERED□	42
TABLE 9□CURRENCY EXCHANGE RATES□	42
1.5□STAKEHOLDERS□	43
1.6□SUMMARY OF CHANGES□	43
2□RESEARCH METHODOLOGY□	44
2.1□RESEARCH DATA□	44
FIGURE 2□AUTOMOTIVE FUEL CELL MARKET: RESEARCH DESIGN□	44
FIGURE 3□RESEARCH DESIGN MODEL□	45
2.1.1□SECONDARY DATA□	45
2.1.1.1□Key secondary sources for automotive fuel cell market□	46
2.1.1.2□Key data from secondary sources□	47
2.1.2□PRIMARY DATA□	48
2.1.2.1□Primary interviews-demand and supply sides□	48

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2.1.2.2	Key industry insights and breakdown of primary interviews	49
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS	49
2.1.2.3	Primary participants	50
2.2	MARKET SIZE ESTIMATION	50
FIGURE 5	RESEARCH METHODOLOGY: HYPOTHESIS BUILDING	51
2.2.1	BOTTOM-UP APPROACH	52
FIGURE 6	BOTTOM-UP APPROACH: AUTOMOTIVE FUEL CELL MARKET	52
2.2.2	TOP-DOWN APPROACH	52
2.2.3	TOP-DOWN APPROACH: AUTOMOTIVE FUEL CELL MARKET	53
FIGURE 7	AUTOMOTIVE FUEL CELL MARKET: MARKET ESTIMATION NOTES	53
FIGURE 8	AUTOMOTIVE FUEL CELL MARKET: RESEARCH DESIGN AND METHODOLOGY - DEMAND SIDE	54
2.3	DATA TRIANGULATION	55
FIGURE 9	DATA TRIANGULATION METHODOLOGY	55
FIGURE 10	MARKET GROWTH PROJECTIONS FROM DEMAND-SIDE DRIVERS AND OPPORTUNITIES	56
2.4	FACTOR ANALYSIS	57
2.4.1	FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY-SIDE	57
2.5	RESEARCH ASSUMPTIONS	57
2.6	RESEARCH LIMITATIONS	58
3	EXECUTIVE SUMMARY	60
FIGURE 11	AUTOMOTIVE FUEL CELL MARKET: OVERVIEW	61
FIGURE 12	AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	62
FIGURE 13	PASSENGER CARS PROJECTED TO LEAD MARKET DURING FORECAST PERIOD (2022-2030)	63
4	PREMIUM INSIGHTS	64
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE FUEL CELL MARKET	64
FIGURE 14	GROWING DEMAND FOR FUEL CELL STACKS AND HEAVY-DUTY COMMERCIAL VEHICLES TO DRIVE MARKET	64
4.2	AUTOMOTIVE FUEL CELL MARKET, BY REGION	65
FIGURE 15	ASIA OCEANIA PROJECTED TO BE LARGEST MARKET DURING FORECAST PERIOD	65
4.3	AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE	65
FIGURE 16	PASSENGER CARS EXPECTED TO DOMINATE MARKET (2022-2030)	65
4.4	AUTOMOTIVE FUEL CELL MARKET, BY FUEL CELL TYPE	66
FIGURE 17	PEMFC EXPECTED TO LEAD AUTOMOTIVE FUEL CELL MARKET (2022-2030)	66
4.5	AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS	66
FIGURE 18	ASIA OCEANIA REGION EXPECTED TO LEAD MARKET FOR HYDROGEN FUEL POINT SETUP (2022-2030)	66
4.6	AUTOMOTIVE FUEL CELL MARKET, BY POWER CAPACITY	67
FIGURE 19	<150 KW FUEL CELLS TO LEAD MARKET (2022-2030)	67
4.7	AUTOMOTIVE FUEL CELL MARKET, BY COMPONENT	67
FIGURE 20	FUEL STACK SEGMENT EXPECTED TO BE LARGEST MARKET BY VALUE (2022-2030)	67
4.8	AUTOMOTIVE FUEL CELL MARKET, BY OPERATING MILES	68
FIGURE 21	251-500 MILES SEGMENT EXPECTED TO LEAD MARKET (2022-2030)	68
5	MARKET OVERVIEW	69
5.1	INTRODUCTION	69
FIGURE 22	HYDROGEN FUEL-CELL ELECTRIC VEHICLE SYSTEM	70
5.2	MARKET DYNAMICS	70
FIGURE 23	AUTOMOTIVE FUEL CELL MARKET: DYNAMICS	71
5.2.1	DRIVERS	71
5.2.1.1	Better fuel efficiency and increased driving range	71
TABLE 10	COMPARISON OF FUEL-CELL ELECTRIC VEHICLE MODELS	72

FIGURE 24	NATURAL GAS REQUIRED TO PROPEL BEV TO 300 MILES VS. FCEV TRAVELING 300 MILES	72
TABLE 11	FCEV ATTRIBUTES VS. ADVANCED BEV FOR 200-MILE AND 300-MILE RANGE	73
5.2.1.2	Rapid increase in investment and development for green hydrogen production	73
FIGURE 25	NUMBER OF HYDROGEN FUEL STATIONS IN US (2016-2021)	74
FIGURE 26	GLOBAL HYDROGEN INVESTMENT AND DEVELOPMENT SCOPE	74
5.2.1.3	Fast refueling	75
TABLE 12	ZERO-EMISSION LIGHT-DUTY VEHICLES REFERENCE COMPARISON: BEV CHARGING VS. FCEV HYDROGEN FUELING	75
5.2.1.4	Reduced oil dependency	76
TABLE 13	US: GASOLINE AVERAGE PRICING TREND OVER LAST FEW YEARS	76
5.2.1.5	Lower emissions than other vehicles	76
5.2.1.5.1	Fuel cell product lifecycle	77
FIGURE 27	FUEL CELL PRODUCT LIFECYCLE	77
5.2.2	RESTRAINTS	77
5.2.2.1	High flammability	77
FIGURE 28	COMPARISON OF AUTOIGNITION TEMPERATURES OF VARIOUS FUELS	78
FIGURE 29	COMPARISON OF MINIMUM IGNITION ENERGY FOR VARIOUS FUELS	78
5.2.2.2	Hard to detect hydrogen leakages	78
5.2.2.3	High initial investments in hydrogen fueling infrastructure	78
FIGURE 30	DISPENSED FUEL COST BUILDUP FOR FUTURE TRANSPORTATION FUELS	79
FIGURE 31	INITIAL INVESTMENTS FOR VARIOUS FUEL INFRASTRUCTURE	79
FIGURE 32	COMPARISON OF BEV AND FCEV	80
5.2.2.4	Lower efficiency than BEVs and HEVs	80
FIGURE 33	GLOBAL ELECTRIC VEHICLE SALES, 2017-2021	80
FIGURE 34	COMPARISON OF HYDROGEN AND ELECTRIC VEHICLE DRIVE	81
5.2.3	OPPORTUNITIES	81
5.2.3.1	Rising demand for fuel-cell vehicles in automotive and transportation	81
5.2.3.1.1	FCEV commercial freight truck developments	82
TABLE 14	FCEV COMMERCIAL FREIGHT TRUCK DEVELOPMENTS	82
5.2.3.1.2	Fuel cell bus development & deployment announcements	82
TABLE 15	FUEL CELL-BUS DEVELOPMENT & DEPLOYMENT ANNOUNCEMENT	82
5.2.3.1.3	Fuel-cell buses around the world, 2021	84
FIGURE 35	OPERATED & PLANNED FUEL-CELL BUSES, 2021	84
5.2.3.2	Fuel-cell vans to be an emerging opportunity for OEMs	84
5.2.3.3	Government initiatives promoting hydrogen infrastructure	85
FIGURE 36	GOVERNMENT-LED HYDROGEN HUB INITIATIVES IN US AND CANADA	85
5.2.3.4	Development of mobile and community hydrogen fueling systems	86
FIGURE 37	MOBILE HYDROGEN-REFUELING STATION IN JAPAN	86
5.2.4	CHALLENGES	86
5.2.4.1	High vehicle costs	86
FIGURE 38	COST OF FUEL CELL STACK FOR PRODUCTION VOLUME OF 1,000 UNITS/YEAR VS. 500,000 UNITS/YEAR	87
5.2.4.2	Insufficient hydrogen infrastructure	87
FIGURE 39	HYDROGEN INFRASTRUCTURE MAINTENANCE COSTS, BY COMPONENT	88
5.2.4.3	Rising demand for BEVs and HEVs	88
5.2.5	AUTOMOTIVE FUEL CELL MARKET: IMPACT OF MARKET DYNAMICS	88
TABLE 16	AUTOMOTIVE FUEL CELL MARKET: IMPACT OF MARKET DYNAMICS	88
5.3	PORTER'S FIVE FORCES ANALYSIS	89
FIGURE 40	PORTER'S FIVE FORCES: AUTOMOTIVE FUEL CELL MARKET	90

TABLE 17	IMPACT OF PORTER'S FIVE FORCES ON AUTOMOTIVE FUEL CELL MARKET	90
5.3.1	THREAT OF SUBSTITUTES	91
5.3.2	THREAT OF NEW ENTRANTS	91
5.3.3	BARGAINING POWER OF BUYERS	91
5.3.4	BARGAINING POWER OF SUPPLIERS	91
5.3.5	INTENSITY OF COMPETITIVE RIVALRY	91
5.4	EXISTING AND UPCOMING FCEV MODELS	92
TABLE 18	EXISTING AND UPCOMING FCEV MODELS	92
5.5	AUTOMOTIVE FUEL CELL MARKET ECOSYSTEM	96
FIGURE 41	AUTOMOTIVE FUEL CELL MARKET: ECOSYSTEM ANALYSIS	96
5.5.1	HYDROGEN FUEL SUPPLIERS	96
5.5.2	TIER I SUPPLIERS (FUEL CELL AND RELATED COMPONENT PRODUCERS)	97
5.5.3	OEMS	97
5.5.4	END USERS	97
TABLE 19	AUTOMOTIVE FUEL CELL MARKET: ROLE OF COMPANIES IN ECOSYSTEM	97
5.6	VALUE CHAIN ANALYSIS	99
FIGURE 42	VALUE CHAIN ANALYSIS OF AUTOMOTIVE FUEL CELL MARKET	99
FIGURE 43	FUEL-CELL SUBCLUSTER AND H2 SUBCLUSTER	101
5.7	MACROECONOMIC INDICATORS	101
5.7.1	GDP TRENDS AND FORECAST FOR MAJOR ECONOMIES	102
TABLE 20	GDP TRENDS AND FORECAST, BY MAJOR ECONOMIES, 2018-2026 (USD BILLION)	102
5.8	FUEL-CELL PRICING ANALYSIS	102
FIGURE 44	DECREASING COST OF FUEL CELL	103
FIGURE 45	FUEL-CELL SYSTEM COST, 2006-2025	103
FIGURE 46	FUEL-CELL SYSTEM & FUEL-CELL STACK COST	104
5.8.1	FUEL-CELL AVERAGE PRICING, BY VEHICLE TYPE	104
TABLE 21	AVERAGE PRICING OF FCEVS, BY VEHICLE TYPE (USD THOUSAND)	104
5.8.2	AVERAGE PRICING OF TOP-SELLING FUEL CELL ELECTRIC CARS	105
TABLE 22	AVERAGE PRICING OF FUEL CELL CARS (2022-2030)	105
5.9	FUEL-CELL BUS SALES AND UPCOMING PROJECTS	105
TABLE 23	EUROPE: ZEV BUS SALES IN MAJOR CITIES AND UPCOMING PROJECTS	105
5.10	COUNTRY-LEVEL TARGETS FUEL CELL VEHICLES AND STATIONS	106
TABLE 24	FCEV TARGETS BY TOP COUNTRIES	106
5.11	TECHNOLOGY ANALYSIS	107
5.11.1	DIRECT BOROHYDRIDE FUEL CELLS	107
FIGURE 47	DIRECT BOROHYDRIDE FUEL CELL WORKING	107
5.11.2	NON-PRECIOUS METAL CATALYST-BASED FUEL CELL	108
FIGURE 48	BALLARD'S FUEL CELL WITH NON-PRECIOUS METAL CATALYST	108
5.11.3	INCREASE IN LIFESPAN FOR NEW FUEL CELLS	108
5.11.4	FUEL CELL HYBRID ELECTRIC VEHICLE	108
5.11.5	PACKAGED FUEL-CELL SYSTEM MODULE	109
FIGURE 49	TOYOTA'S NEW PACKAGED FUEL-CELL SYSTEM MODULE	109
5.11.6	METHANE FUEL CELLS	109
5.12	PATENT ANALYSIS	110
FIGURE 50	NUMBER OF PUBLISHED PATENTS (2013-2022)	110
FIGURE 51	NUMBER OF DOCUMENTS	110
TABLE 25	IMPORTANT PATENT REGISTRATIONS RELATED TO AUTOMOTIVE FUEL CELL MARKET	111

5.13	CASE STUDY ANALYSIS	114
TABLE 26	CASE STUDY 1: BALLARD FUEL CELL ZERO-EMISSION TRUCKS IN SHANGHAI	114
TABLE 27	CASE STUDY 2: NON-PRECIOUS METAL CATALYST	114
TABLE 28	CASE STUDY 3: FUEL-CELL ZERO-EMISSION BUSES	115
TABLE 29	CASE STUDY 4: FUEL-CELL BUSES FOR CITY TRANSIT IN FRANCE	116
5.14	REGULATORY OVERVIEW	116
FIGURE 52	EMISSION REDUCTION OVERVIEW OF MAJOR COUNTRIES, 2021	117
TABLE 30	EURO VI STANDARDS 2021: EUROPEAN EMISSION NORMS	117
TABLE 31	US III STANDARDS 2021: US EMISSION NORMS	118
TABLE 32	CHINA 6A, 6B STANDARDS 2021: CHINA EMISSION NORMS	118
TABLE 33	JAPAN WLTC STANDARDS 2021: JAPAN EMISSION NORMS	119
TABLE 34	BRAZIL L-6 STANDARDS 2021: BRAZIL EMISSION NORMS	119
TABLE 35	NORTH AMERICA: KEY DEVELOPMENTS	119
TABLE 36	EUROPE: KEY DEVELOPMENTS	120
TABLE 37	ASIA OCEANIA: KEY DEVELOPMENTS	120
5.14.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	121
TABLE 38	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	121
TABLE 39	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	122
TABLE 40	ASIA OCEANIA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	123
5.15	TRENDS AND DISRUPTIONS	124
FIGURE 53	AUTOMOTIVE FUEL CELL MARKET: TRENDS AND DISRUPTIONS	124
5.16	KEY CONFERENCES AND EVENTS, 2022-2023	125
TABLE 41	AUTOMOTIVE FUEL CELL MARKET: CONFERENCES AND EVENTS	125
5.17	AUTOMOTIVE FUEL CELL MARKET, SCENARIOS (2022-2030)	125
5.17.1	MOST LIKELY SCENARIO	125
FIGURE 54	AUTOMOTIVE FUEL CELL MARKET -FUTURE TRENDS & SCENARIO, 2021-2030 (UNITS)	126
TABLE 42	AUTOMOTIVE FUEL CELL MARKET (MOST LIKELY), BY REGION, 2022-2030 (THOUSAND UNITS)	126
5.17.2	OPTIMISTIC SCENARIO	126
TABLE 43	AUTOMOTIVE FUEL CELL MARKET (OPTIMISTIC), BY REGION, 2022-2030 (THOUSAND UNITS)	127
5.17.3	PESSIMISTIC SCENARIO	127
TABLE 44	AUTOMOTIVE FUEL CELL MARKET (PESSIMISTIC), BY REGION, 2022-2030 (THOUSAND UNITS)	127
6	AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE	128
6.1	INTRODUCTION	129
FIGURE 55	AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (THOUSAND UNITS)	130
TABLE 45	AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (THOUSAND UNITS)	130
TABLE 46	AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (THOUSAND UNITS)	130
6.1.1	OPERATIONAL DATA	131
TABLE 47	POTENTIAL MARKET FOR NEW ZERO-EMISSION BUSES PER YEAR ACROSS EUROPE	131
6.1.2	ASSUMPTIONS	132
TABLE 48	ASSUMPTIONS: BY VEHICLE TYPE	132
6.1.3	RESEARCH METHODOLOGY	132
6.2	PASSENGER CARS	133
6.2.1	LOW OPERATING COSTS AND EMISSIONS TO DRIVE PASSENGER CAR MARKET	133
TABLE 49	PASSENGER CAR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	134
TABLE 50	PASSENGER CAR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	134
6.3	LCV	135
6.3.1	RIISING DEMAND FOR LAST-MILE DELIVERY TO BOOST LCV SEGMENT	135

TABLE 51	LCV: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	135
TABLE 52	LCV: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	135
6.4	BUS	136
6.4.1	GOVERNMENT FUNDING TO DRIVE BUS MARKET	136
TABLE 53	BUS DEPLOYMENT PROJECTS	137
TABLE 54	BUS: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	137
TABLE 55	BUS: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	138
6.5	TRUCK	138
6.5.1	LONGER LIFE AND RANGE OF HYDROGEN FUEL-CELL TRUCKS TO DRIVE HYDROGEN TRUCK MARKET	138
TABLE 56	MASS DIFFERENCE BETWEEN BASELINE VEHICLE AND ITS FUEL-CELL TRUCK VERSION	139
TABLE 57	DEMONSTRATION PROJECTS/DEPLOYMENT OF FUEL-CELL TRUCKS	139
TABLE 58	MAJOR FUEL-CELL TRUCK PROTOTYPES	140
TABLE 59	POWERTRAIN BENCHMARKING FOR TRUCKS >12 TONS	140
TABLE 60	TRUCK: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	141
TABLE 61	TRUCK: AUTOMOTIVE FUEL CELL MARKET SIZE, BY REGION, 2022-2030 (THOUSAND UNITS)	141
6.6	KEY INDUSTRY INSIGHTS	142
7	AUTOMOTIVE FUEL CELL MARKET, BY COMPONENT	143
7.1	INTRODUCTION	144
FIGURE 56	AUTOMOTIVE FUEL CELL MARKET, BY COMPONENT (USD MILLION)	145
TABLE 62	AUTOMOTIVE FUEL CELL MARKET BY COMPONENT, 2018-2021 (USD MILLION)	145
TABLE 63	AUTOMOTIVE FUEL CELL MARKET, BY COMPONENT, 2022-2030 (USD MILLION)	145
7.1.1	OPERATIONAL DATA	146
TABLE 64	POPULAR FUEL-CELL PROVIDERS ACROSS THE WORLD	146
FIGURE 57	FUEL-CELL POWERTRAIN	147
7.1.2	ASSUMPTIONS	147
TABLE 65	ASSUMPTIONS: BY COMPONENT TYPE	147
7.1.3	RESEARCH METHODOLOGY	147
7.2	FUEL STACK	148
7.2.1	NEED FOR FUEL CONVERSION IN FCEVS TO LEAD MARKET	148
TABLE 66	FUEL STACK: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (USD MILLION)	148
TABLE 67	FUEL STACK: AUTOMOTIVE FUEL-CELL MARKET, BY REGION, 2022-2030 (USD MILLION)	148
7.3	FUEL PROCESSOR	149
7.3.1	INCREASED FUEL CELL LIFE DUE TO HIGHLY EFFICIENT FUEL PROCESSORS TO DRIVE MARKET	149
TABLE 68	FUEL PROCESSOR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (USD MILLION)	149
TABLE 69	FUEL PROCESSOR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (USD MILLION)	149
7.4	POWER CONDITIONER	150
7.4.1	NEED FOR EFFICIENT POWER CONVERSION IN FUEL CELLS TO LEAD DEMAND	150
TABLE 70	POWER CONDITIONER: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (USD MILLION)	150
TABLE 71	POWER CONDITIONER: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (USD MILLION)	150
7.5	AIR COMPRESSOR	151
7.5.1	FUEL CELL PUBLIC TRANSPORT VEHICLE ADOPTION TO DRIVE SEGMENT	151
TABLE 72	AIR COMPRESSOR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (USD MILLION)	151
TABLE 73	AIR COMPRESSOR: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (USD MILLION)	151
7.6	HUMIDIFIER	152
7.6.1	DEMAND FOR HYDRATED PEM FUEL CELLS TO DRIVE SEGMENT	152
TABLE 74	HUMIDIFIER: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (USD MILLION)	152
TABLE 75	HUMIDIFIER: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (USD MILLION)	152



7.7	KEY INDUSTRY INSIGHTS	153
8	AUTOMOTIVE FUEL CELL MARKET, BY SPECIALIZED VEHICLE TYPE	154
8.1	INTRODUCTION	154
8.2	MATERIAL-HANDLING VEHICLES	154
TABLE 76	POLYMER ELECTROLYTE MEMBRANE (PEM) FUEL CELLS AND BATTERY-POWERED FORKLIFTS VS. PALLET JACKS	155
TABLE 77	COMPARISON OF TOTAL ANNUALIZED COSTS PER LIFT TRUCK	156
8.3	AUXILIARY POWER UNIT FOR REFRIGERATED TRUCKS	156
8.4	KEY INDUSTRY INSIGHTS	157
9	AUTOMOTIVE FUEL CELL MARKET, BY OPERATING MILES	158
9.1	INTRODUCTION	159
FIGURE 58	AUTOMOTIVE FUEL CELL MARKET, BY OPERATING MILES, 2022-2030 (THOUSAND UNITS)	160
TABLE 78	AUTOMOTIVE FUEL CELL MARKET, BY OPERATING MILES, 2018-2021 (THOUSAND UNITS)	160
TABLE 79	AUTOMOTIVE FUEL CELL MARKET, BY OPERATING MILES, 2022-2030 (THOUSAND UNITS)	160
9.1.1	OPERATIONAL DATA	161
TABLE 80	RANGE OF BEST-SELLING AND UPCOMING FUEL-CELL VEHICLES	161
9.1.2	ASSUMPTIONS	162
TABLE 81	ASSUMPTIONS: BY OPERATING MILES	162
9.1.3	RESEARCH METHODOLOGY	162
9.2	0-250 MILES	162
9.2.1	GROWING USAGE IN FUEL CELL BUSES AND LCVS TO DRIVE SEGMENT	162
TABLE 82	0-250 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	163
TABLE 83	0-250 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	163
9.3	251-500 MILES	163
9.3.1	DEMAND FOR MEDIUM-RANGE PERSONAL VEHICLES TO DRIVE MARKET	163
TABLE 84	251-500 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	164
TABLE 85	251-500 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	164
9.4	ABOVE 500 MILES	164
9.4.1	FUEL CELL TRUCKS AND PASSENGER CARS TO DRIVE SEGMENT	164
TABLE 86	ABOVE 500 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	165
TABLE 87	ABOVE 500 MILES: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	165
9.5	KEY INDUSTRY INSIGHTS	165
10	AUTOMOTIVE FUEL CELL MARKET, BY POWER OUTPUT	166
10.1	INTRODUCTION	167
FIGURE 59	AUTOMOTIVE FUEL CELL MARKET, BY POWER OUTPUT, 2022-2030 (THOUSAND UNITS)	168
TABLE 88	AUTOMOTIVE FUEL CELL MARKET, BY POWER OUTPUT, 2018-2021 (THOUSAND UNITS)	168
TABLE 89	AUTOMOTIVE FUEL CELL MARKET, BY POWER OUTPUT, 2022-2030 (THOUSAND UNITS)	168
10.1.1	OPERATIONAL DATA	169
TABLE 90	POWER RATING OF BESTSELLING FUEL-CELL VEHICLES	169
10.1.2	ASSUMPTIONS	170
TABLE 91	ASSUMPTIONS: BY POWER OUTPUT	170
10.1.3	RESEARCH METHODOLOGY	170
10.2	<150 KW	170
10.2.1	GROWING DEMAND FOR FUEL-CELL PASSENGER CARS TO DRIVE MARKET	170
TABLE 92	<150 KW: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (THOUSAND UNITS)	171
TABLE 93	<150 KW: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	171
10.3	150-250 KW	172
10.3.1	DEMAND FOR HIGH-POWER, HEAVY-DUTY VEHICLES TO DRIVE MARKET	172

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TABLE 94	150-250 KW: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	172
TABLE 95	150-250 KW: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	172
10.4	>250 KW	173
10.4.1	LONG-HAUL TRUCKING TO PROVIDE AMPLE OPPORTUNITIES FOR SEGMENT GROWTH	173
TABLE 96	>250 KW: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	173
TABLE 97	>250 KW: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	174
10.5	KEY INDUSTRY INSIGHTS	174
11	AUTOMOTIVE FUEL CELL MARKET, BY FUEL TYPE	175
11.1	INTRODUCTION	175
TABLE 98	FUEL TYPE USED IN FUEL CELLS VS. LI-ION BATTERY	175
11.2	HYDROGEN	176
11.3	METHANOL	176
11.4	ETHANOL	176
11.5	KEY INDUSTRY INSIGHTS	177
12	AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS	178
12.1	INTRODUCTION	179
FIGURE 60	INFRASTRUCTURE COST COMPARISON OF FCEVS AND BEVS	179
FIGURE 61	AUTOMOTIVE FUEL CELL MARKET, HYDROGEN FUEL POINTS BY REGION, 2020-2030 (UNITS)	180
TABLE 99	HYDROGEN FUEL POINTS: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (UNIT)	180
TABLE 100	HYDROGEN FUEL POINTS: AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (FUEL POINTS)	180
12.1.1	OPERATIONAL DATA	181
TABLE 101	AUTOMOTIVE HYDROGEN FUEL POINTS AS OF DECEMBER 2021	181
12.1.2	ASSUMPTIONS	182
TABLE 102	ASSUMPTIONS: BY HYDROGEN FUEL POINTS	182
12.1.3	RESEARCH METHODOLOGY	182
12.2	ASIA OCEANIA	182
TABLE 103	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2018-2021 (FUEL POINTS)	183
TABLE 104	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2022-2030 (FUEL POINTS)	183
12.3	EUROPE	184
TABLE 105	EUROPE: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2018-2021 (FUEL POINTS)	184
TABLE 106	EUROPE: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2022-2030 (FUEL POINTS)	185
12.4	NORTH AMERICA	185
TABLE 107	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2018-2021 (FUEL POINTS)	186
TABLE 108	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET, BY HYDROGEN FUEL POINTS, 2022-2030 (FUEL POINTS)	186
12.5	KEY INDUSTRY INSIGHTS	186
13	AUTOMOTIVE FUEL CELL MARKET, BY FUEL CELL TYPE	187
13.1	INTRODUCTION	188
TABLE 109	INFRASTRUCTURE COST COMPARISON: FCEVS VS. BEVS	188
FIGURE 62	AUTOMOTIVE FUEL CELL MARKET, BY FUEL CELL TYPE, 2022-2030 (THOUSAND UNITS)	188
TABLE 110	AUTOMOTIVE FUEL CELL MARKET, BY FUEL CELL TYPE, 2018-2021 (THOUSAND UNITS)	189
TABLE 111	AUTOMOTIVE FUEL CELL MARKET, BY FUEL CELL TYPE, 2022-2030 (THOUSAND UNITS)	189
13.1.1	ASSUMPTIONS	189
TABLE 112	ASSUMPTIONS: BY FUEL CELL TYPE	189
13.1.2	RESEARCH METHODOLOGY	190
13.2	POLYMER ELECTROLYTE MEMBRANE FUEL CELL (PEMFC)	190
13.3	DIRECT METHANOL FUEL CELL (DMFC)	190
13.4	SOLID OXIDE FUEL CELL (SOFC)	191

13.5	ALKALINE FUEL CELL (AFC)	191
13.6	PHOSPHORIC ACID FUEL CELL (PAFC)	191
13.7	KEY INDUSTRY INSIGHTS	191
14	AUTOMOTIVE FUEL CELL MARKET, BY REGION	192
14.1	INTRODUCTION	192
TABLE 113	AUTOMOTIVE FUEL CELL TARGETS AROUND THE WORLD	193
FIGURE 63	AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	194
TABLE 114	AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2018-2021 (THOUSAND UNITS)	194
TABLE 115	AUTOMOTIVE FUEL CELL MARKET, BY REGION, 2022-2030 (THOUSAND UNITS)	194
TABLE 116	AUTOMOTIVE FUEL CELL MARKET STEPS TAKEN BY MAJOR COUNTRIES	195
14.2	ASIA OCEANIA	197
FIGURE 64	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET SNAPSHOT	198
TABLE 117	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET - UPCOMING PROJECTS	198
TABLE 118	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2018-2021 (THOUSAND UNITS)	200
TABLE 119	ASIA OCEANIA: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2022-2030 (THOUSAND UNITS)	200
14.2.1	CHINA	201
14.2.1.1	Adoption of zero-emission public transport buses to drive market	201
FIGURE 65	CHINESE FCEV DEMONSTRATION OF CITY CLUSTER POLICY	201
FIGURE 66	CHINESE FCEV SCENARIO	202
TABLE 120	CHINA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	202
TABLE 121	CHINA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	203
14.2.2	JAPAN	203
14.2.2.1	OEM plans for fuel cell vehicles to increase demand	203
TABLE 122	JAPAN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	204
TABLE 123	JAPAN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	204
14.2.3	SOUTH KOREA	204
14.2.3.1	Government efforts for hydrogen economy to drive market	204
TABLE 124	SOUTH KOREA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	205
TABLE 125	SOUTH KOREA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	205
14.2.4	AUSTRALIA	206
14.2.4.1	Plans for local manufacturing of fuel cells to boost market	206
TABLE 126	AUSTRALIA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	206
TABLE 127	AUSTRALIA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	206
14.2.5	INDIA	207
14.2.5.1	Increasing prices of petrol and diesel to boost market	207
TABLE 128	INDIA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	207
TABLE 129	INDIA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	207
14.3	EUROPE	208
FIGURE 67	EUROPE: AUTOMOTIVE FUEL CELL COMMERCIAL VEHICLE OUTLOOK	209
TABLE 130	EUROPE: HYDROGEN PLANS AND REGULATIONS	210
TABLE 131	EUROPE: RELEVANT EXPERIENCE/PRODUCTS OF OEMS	211
TABLE 132	EUROPE: TARGETS, VISIONS, AND PROJECTIONS	212
FIGURE 68	EUROPE: AUTOMOTIVE FUEL CELL MARKET, 2022-2030 (THOUSAND UNITS)	212
TABLE 133	EUROPE: AUTOMOTIVE FUEL CELL MARKET-UPCOMING PROJECTS	213
TABLE 134	EUROPE: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2018-2021 (THOUSAND UNITS)	214
TABLE 135	EUROPE: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2022-2030 (THOUSAND UNITS)	215
14.3.1	BELGIUM	215

14.3.1.1	Government initiatives for speeding up deployment of hydrogen FCEVs will drive market	215
TABLE 136	BELGIUM: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	216
TABLE 137	BELGIUM: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	216
14.3.2	DENMARK	216
14.3.2.1	Steady growth in hydrogen infrastructure to cater to FCEV growth	216
TABLE 138	DENMARK: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	217
TABLE 139	DENMARK: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	217
14.3.3	FRANCE	218
14.3.3.1	Presence of major OEMs to drive market growth	218
TABLE 140	FRANCE: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	218
TABLE 141	FRANCE: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	219
14.3.4	GERMANY	219
14.3.4.1	Fast development of hydrogen-refueling station to support market growth	219
TABLE 142	GERMANY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	220
TABLE 143	GERMANY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	220
14.3.5	ITALY	220
14.3.5.1	Electrification of public transport fleet to drive market	220
TABLE 144	ITALY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	221
TABLE 145	ITALY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	221
14.3.6	NETHERLANDS	222
14.3.6.1	Government initiatives to cater to market growth	222
TABLE 146	NETHERLANDS: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	222
TABLE 147	NETHERLANDS: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	222
14.3.7	NORWAY	223
14.3.7.1	Development of strong refueling station network to drive market	223
TABLE 148	NORWAY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	224
TABLE 149	NORWAY: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	224
14.3.8	SWEDEN	224
14.3.8.1	Technological advancements to drive market growth	224
TABLE 150	SWEDEN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	225
TABLE 151	SWEDEN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	225
14.3.9	SPAIN	226
14.3.9.1	Government subsidy plans and investment initiatives to drive market	226
TABLE 152	SPAIN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	226
TABLE 153	SPAIN: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	226
14.3.10	SWITZERLAND	227
14.3.10.1	Growing procurement of fuel cell vehicles from leading OEMs to drive market	227
TABLE 154	SWITZERLAND: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	227
TABLE 155	SWITZERLAND: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	227
14.3.11	UK	228
14.3.11.1	Plan for zero-emission public transport to drive market	228
TABLE 156	UK: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	228
TABLE 157	UK: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	229
14.4	NORTH AMERICA	229
FIGURE 69	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET SNAPSHOT	230
TABLE 158	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET-UPCOMING PROJECTS	231
TABLE 159	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2018-2021 (THOUSAND UNITS)	232

TABLE 160	NORTH AMERICA: AUTOMOTIVE FUEL CELL MARKET, BY COUNTRY, 2022-2030 (THOUSAND UNITS)	232
14.4.1	CANADA	232
14.4.1.1	Presence of leading fuel cell suppliers to drive market	232
TABLE 161	CANADA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	233
TABLE 162	CANADA: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	233
14.4.2	MEXICO	234
14.4.2.1	Future investments to drive market	234
TABLE 163	MEXICO: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	234
TABLE 164	MEXICO: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	234
14.4.3	US	235
14.4.3.1	Adoption by truck industry to drive market	235
FIGURE 70	US AUTOMOTIVE FUEL CELL OUTLOOK	235
TABLE 165	US: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2018-2021 (UNITS)	236
TABLE 166	US: AUTOMOTIVE FUEL CELL MARKET, BY VEHICLE TYPE, 2022-2030 (UNITS)	236
15	COMPETITIVE LANDSCAPE	237
15.1	OVERVIEW	237
15.2	MARKET SHARE ANALYSIS	237
TABLE 167	MARKET SHARE ANALYSIS, 2021	237
FIGURE 71	MARKET SHARE ANALYSIS FOR AUTOMOTIVE FUEL CELL, 2021	238
FIGURE 72	TOP PUBLIC/LISTED PLAYERS THAT DOMINATED AUTOMOTIVE FUEL CELL MARKET DURING LAST FIVE YEARS	240
15.3	COMPETITIVE SCENARIO	240
15.3.1	DEALS	240
TABLE 168	DEALS, 2019-2022	241
15.3.2	NEW PRODUCT DEVELOPMENTS	244
TABLE 169	NEW PRODUCT DEVELOPMENTS, 2019-2022	244
15.3.3	OTHERS, 2019-2022	246
TABLE 170	EXPANSIONS, 2019-2022	246
15.4	COMPETITIVE LEADERSHIP MAPPING FOR AUTOMOTIVE FUEL CELL MARKET	247
15.4.1	STARS	247
15.4.2	EMERGING LEADERS	247
15.4.3	PERVASIVE PLAYERS	247
15.4.4	EMERGING COMPANIES	248
FIGURE 73	AUTOMOTIVE FUEL CELL MARKET: COMPETITIVE LEADERSHIP MAPPING FOR TOP MANUFACTURERS, 2021	248
TABLE 171	AUTOMOTIVE FUEL CELL MARKET: COMPANY FOOTPRINT, 2022	249
TABLE 172	AUTOMOTIVE FUEL CELL MARKET: COMPANY APPLICATION FOOTPRINT FOR FUEL CELL MANUFACTURERS, 2022	249
TABLE 173	AUTOMOTIVE FUEL CELL MARKET: REGIONAL FOOTPRINT FOR FUEL CELL MANUFACTURERS, 2022	250
15.5	COMPETITIVE EVALUATION QUADRANT, OTHER KEY PLAYERS AND START-UPS	250
15.5.1	PROGRESSIVE COMPANIES	250
15.5.2	RESPONSIVE COMPANIES	250
15.5.3	DYNAMIC COMPANIES	250
15.5.4	STARTING BLOCKS	251
FIGURE 74	AUTOMOTIVE FUEL CELL MARKET: COMPETITIVE LEADERSHIP MAPPING OTHER KEY PLAYERS, 2022	251
FIGURE 75	AUTOMOTIVE FUEL CELL MARKET: COMPETITIVE LEADERSHIP MAPPING START-UPS, 2022	252
TABLE 174	AUTOMOTIVE FUEL CELL MARKET: DETAILED LIST OF KEY START-UPS	253

**Automotive Fuel Cell Market by Vehicle Type (Buses, Trucks, LCVs, Passenger Cars), Component, Fuel Cell Type, Fuel Type, Hydrogen Fuel Points, Operating Miles, Power Capacity, Specialized Vehicle Type and Region - Global forecast to 2030**

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