

North America Hydrogen Pumps Market By Type (Mechanical, Electronic), By Application (Low Flow Rate Pumps, Medium Flow Rate Pumps), By Country, By Competition, Forecast and Opportunities 2020-2030F

Market Report | 2025-05-23 | 120 pages | TechSci Research

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Report description:

Market Overview

The North America Hydrogen Pumps Market was valued at USD 920.22 million in 2024 and is projected to reach USD 1,244.99 million by 2030, growing at a CAGR of 5.17% during the forecast period. This market encompasses the manufacturing, deployment, and maintenance of hydrogen pump systems used primarily in fueling stations for hydrogen-powered vehicles and industrial applications. These pumps serve as essential infrastructure for safe and efficient hydrogen transfer. Market growth is being driven by the increasing push toward zero-emission transportation and widespread decarbonization efforts. Hydrogen fuel cell technology, particularly in heavy-duty vehicles where battery-electric solutions are limited, is gaining momentum. The U.S. and Canadian governments are actively supporting hydrogen infrastructure through grants, tax incentives, and collaborative partnerships. Investment is surging in regions like California, reflecting a broader trend in hydrogen station development. Advancements in hydrogen compression, dispensing technologies, and multi-sector applications such as rail, maritime, and stationary energy storage are also fueling demand. As part of North America's clean energy transition, hydrogen pumps are poised to become a central component of sustainable energy systems.

Key Market Drivers

Government Policy Push for Clean Energy Transition Driving Hydrogen Infrastructure Growth

The North America hydrogen pumps market is witnessing robust growth due to proactive government initiatives in support of clean energy. Authorities across the United States and Canada are promoting hydrogen infrastructure as a vital tool for achieving decarbonization goals. Programs such as the U.S. Department of Energy's Hydrogen Shot initiative aim to drastically reduce the cost of clean hydrogen, catalyzing investment in hydrogen ecosystems, including pump stations. Simultaneously, Canadian regions like British Columbia and Quebec are advancing strategic hydrogen deployment plans with infrastructure rollouts. This strong policy backing reduces barriers for private investment and encourages a broad spectrum of market participants. Financial

incentives, including grants and subsidies, are lowering the risk profile of hydrogen infrastructure projects, accelerating development in the early market stages. Furthermore, public investments serve as a validation of hydrogen's role in the energy landscape, fostering greater industry confidence. Notably, over USD 2 billion was allocated in 2023 by the U.S. Department of Energy for hydrogen initiatives under the Infrastructure Investment and Jobs Act, including more than USD 200 million earmarked specifically for fueling infrastructure like pumps.

Key Market Challenges

High Capital Investment Requirements and Uncertain Return on Investment

A major hurdle in the North America hydrogen pumps market is the substantial capital required to establish pump-equipped refueling infrastructure. Building hydrogen stations involves high costs related to pressurization systems, safety mechanisms, specialized components, and regulatory compliance. The investment for a single station can surpass USD 2 million, making financial feasibility a concern, especially amid low fuel cell vehicle adoption rates that limit short-term revenue potential. Unlike established conventional fuel networks, hydrogen stations often experience low utilization, leading to long payback periods. This financial risk deters private investment unless offset by public subsidies or shared-risk business models. The cost-intensiveness and slow return on investment continue to challenge market expansion and scalability.

Key Market Trends

Integration of Hydrogen Pumps into Multi-Fuel Refueling Stations

An emerging trend in the North America hydrogen pumps market is the incorporation of hydrogen dispensing units into multi-fuel refueling stations. Traditionally isolated due to technical requirements, hydrogen systems are now being integrated alongside gasoline, diesel, and electric vehicle charging setups. This co-location strategy helps optimize space usage, broaden fuel offerings, and streamline the transition toward low-emission mobility. It also enhances convenience for consumers and reduces operational costs for station operators. This integrated approach supports the growing need for diversified energy solutions and accelerates the commercial viability of hydrogen refueling infrastructure.

Key Market Players

- Parker Hannifin Corporation
- KSB SE & Co. KGaA
- Sulzer Ltd.
- Neuman & Esser Group
- Flowserve Corporation
- ITT Inc.
- Emerson Electric Co.
- Atlas Copco AB

Report Scope:

In this report, the North America Hydrogen Pumps Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- North America Hydrogen Pumps Market, By Type:
- o Mechanical
- o Electronic
- North America Hydrogen Pumps Market, By Application:
- o Low Flow Rate Pumps
- o Medium Flow Rate Pumps
- North America Hydrogen Pumps Market, By Country:
- o United States
- o Canada
- o Mexico
- Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Hydrogen Pumps Market. Available Customizations:

North America Hydrogen Pumps 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).

Table of Contents:

- 1. Product Overview
- 1.1. Market Definition
- 1.2. Scope of the Market
- 1.2.1. Markets Covered
- 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations
- 2. Research Methodology
- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
- 2.5.1. Secondary Research
- 2.5.2. Primary Research
- 2.6. Approach for the Market Study
- 2.6.1. The Bottom-Up Approach
- 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
- 2.8.1. Data Triangulation & Validation
- 3. Executive Summary
- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends
- 4. Voice of Customer
- 5. North America Hydrogen Pumps Market Outlook
- 5.1. Market Size & Forecast
- 5.1.1. By Value
- 5.2. Market Share & Forecast
- 5.2.1. By Type (Mechanical, Electronic)
- 5.2.2. By Application (Low Flow Rate Pumps, Medium Flow Rate Pumps)
- 5.2.3. By Country (United States, Canada, Mexico)
- 5.2.4. By Company (2024)
- 5.3. Market Map
- 6. United States Hydrogen Pumps Market Outlook
- 6.1. Market Size & Forecast
- 6.1.1. By Value
- 6.2. Market Share & Forecast

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- 6.2.1. By Type
- 6.2.2. By Application
- 7. Canada Hydrogen Pumps Market Outlook
- 7.1. Market Size & Forecast
- 7.1.1. By Value
- 7.2. Market Share & Forecast
- 7.2.1. Ву Туре
- 7.2.2. By Application
- 8. Mexico Hydrogen Pumps Market Outlook
- 8.1. Market Size & Forecast
- 8.1.1. By Value
- 8.2. Market Share & Forecast
- 8.2.1. By Type
- 8.2.2. By Application
- 9. Market Dynamics
- 9.1. Drivers
- 9.2. Challenges
- 10. Market Trends & Developments
- 10.1. Merger & Acquisition (If Any)
- 10.2. Product Launches (If Any)
- 10.3. Recent Developments
- 11. Company Profiles
- 11.1. Parker Hannifin Corporation
- 11.1.1. Business Overview
- 11.1.2. Key Revenue and Financials
- 11.1.3. Recent Developments
- 11.1.4. Key Personnel/Key Contact Person
- 11.1.5. Key Product/Services Offered
- 11.2. KSB SE & Co. KGaA
- 11.3. Sulzer Ltd.
- 11.4. Neuman & Esser Group
- 11.5. Flowserve Corporation
- 11.6. ITT Inc.
- 11.7. Emerson Electric Co.
- 11.8. Atlas Copco AB
- 12. Strategic Recommendations
- 13. About Us & Disclaimer

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