

Small-Scale LNG Market by Type (Liquefaction, Regasification), Application (Heavy-Duty Vehicles, Industrial & Power, Marine Transport), Mode of supply (Trucks, Trans-shipment & Bunkering) Region (North America, Europe, APAC, MEA) - Global Forecast to 2028

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Report description:

The small-scale LNG market is projected to grow from USD 46.4 billion in 2023 to USD 92.8 billion by 2028, recording a CAGR of 14.9% during the forecast period. This growth can be attributed to the rising demand for small-scale LNG in sectors such as heavy-duty vehicles, marine transport, and industrial and power applications. The increased adoption of small-scale LNG in these industries is expected to drive market expansion. However, the growth of the market may face obstacles due to limited receiving terminal infrastructure in the Asia-Pacific region and the fluctuating price of small-scale LNG. These factors could impede the market's progress by affecting the availability and accessibility of small-scale LNG, hindering its widespread adoption and potential for further growth.

Liquefaction segment is likely to drive the global market during the forecast period

The small-scale LNG market has been segmented on the basis of type as liquefaction and regasification. The Regasification segment accounted for the 2nd largest larger of the market during the forecast period. The regasification segment in the small-scale LNG market refers to the process of converting liquefied natural gas (LNG) back into its gaseous state. LNG is transported and stored in a liquid form due to its significantly reduced volume compared to its gaseous state, which makes it more economical for long-distance transportation. However, before it can be used, LNG needs to be regasified, or reconverted into natural gas, so that it can be injected into the natural gas grid or used as fuel. Natural gas is considered a cleaner and more environmentally friendly fuel compared to coal and oil. As the world focuses on reducing greenhouse gas emissions and

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transitioning to cleaner energy sources, the demand for natural gas is expected to rise. Regasification units play a crucial role in meeting this increasing demand by facilitating the utilization of LNG. Additionally, Governments and energy companies are investing in small-scale LNG infrastructure, including regasification terminals and facilities. These investments aim to enhance energy security, diversify fuel sources, and provide access to natural gas in regions where pipeline infrastructure is inadequate. This infrastructure development will fuel the growth of the regasification segment.

Marine Transport segment is expected to account for the 2nd largest market share during the forecast period

The maritime industry is under increasing pressure to reduce emissions and comply with stricter environmental regulations. LNG is considered a cleaner fuel compared to traditional marine fuels like heavy fuel oil and diesel. It offers significant emissions reductions in terms of sulfur oxides (SOx), nitrogen oxides (NOx), particulate matter, and greenhouse gases. This has led to a growing interest in LNG as a fuel for ships, particularly in emission-controlled areas such as coastal regions and ports. Additionally, LNG offers better energy efficiency compared to conventional marine fuels. LNG has a higher energy content per unit of weight, allowing ships to achieve longer voyage distances with the same fuel capacity. This becomes particularly advantageous for vessels involved in long-haul transportation, such as ferries, offshore support vessels, and even some bulk carriers.

Europe accounts for the second largest market during the forecast period

Europe is expected to account for the 2nd largest market during the forecast period due to significant developments in various end-use applications such as industrial & power, heavy-duty vehicles, and marine transport. Europe has been actively seeking energy diversification to reduce its dependence on traditional fossil fuels. Small-scale LNG offers an alternative energy source that is cleaner and more environmentally friendly compared to coal or oil. It is seen as a bridge fuel towards a low-carbon future. Additionally, Europe has been at the forefront of implementing stringent environmental regulations. Small-scale LNG is considered a cleaner fuel option as it emits significantly lower levels of pollutants and greenhouse gases compared to other fossil fuels. This aligns with the European Union's efforts to reduce carbon emissions and improve air quality. Overall, the Europe region's small-scale LNG market is poised for growth due to the increasing emphasis on energy diversification, environmental regulations, decentralization of energy supply, and the expanding adoption of LNG in the transport sector.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the small-scale LNG marketplace.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub-segments and information gathered through secondary research.

The break-up of primary interviews is given below:

-□By Company Type - Tier 1 - 30%, Tier 2 - 50%, and Tier 3 - 20%

-□By Designation - C level Executives - 40%, Director level - 20%, and Others* - 40%

-□By Region - North America - 20%, Europe - 20%, Asia Pacific - 40%, Middle East & Africa - 5%, Latin America - 15%.

Notes: *Others include sales, marketing, and product managers.

Notes: Tier 1: >USD 5 Billion; Tier 2: USD 1 Billion- USD 5 Billion; and Tier 3: <USD 1 Billion

Companies Covered: The companies profiled in this market research report include Linde plc (US), Wartsila Corporation (Finland), Honeywell International Inc. (US), Shell plc (UK), Air Products & Chemicals, Inc. (US), ENGIE S.A (France), Chart Industries, Inc. (US), Gasum oy (Finland), Sofregaz (France), and Excelerate Energy Inc (US). among others.

Research Coverage:

The market study covers the small-scale LNG market across various segments. It aims at estimating the market size and the growth potential of this market across different segments based on application, type, mode of supply and region. The study also

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includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their position in the small-scale LNG market.

Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall small-scale LNG Market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Price competitiveness of LNG compared to other transportation fuel, The advantages of small-scale plants over large-scale will augment the market, Environmental benefits and stricter regulations will support the market growth, The fiscal regime and subsidies to support the market growth, Rising demand for LNG in bunkering, road transportation, and off-grid power), restraints (Limited LNG receiving terminal infrastructure in Asia Pacific compared to other regions, Depletion of natural resources and volatility in prices of raw materials, opportunities (Integration of new technology), and challenges (Supply chain disruptions, limited supply, and retrofitting costs are the major challenges that can affect the growth of small-scale LNG) influencing the growth of the small-scale LNG market
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the small-scale LNG market
- Market Development: Comprehensive information about lucrative markets - the report analyses the small-scale LNG market across varied regions
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the small-scale LNG market
- Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Linde plc (US), Wartsila Corporation (Finland), Honeywell International Inc. (US), Shell plc (UK), Air Products & Chemicals, Inc. (US), ENGIE S.A (France), Chart Industries, Inc. (US), Gasum oy (Finland), Sofregaz (France), and Excelebrate Energy Inc (US) among others in the small-scale LNG market

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(Heavy-Duty Vehicles, Industrial & Power, Marine Transport), Mode of supply
(Trucks, Trans-shipment & Bunkering) Region (North America, Europe, APAC, MEA) -
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