

Europe Natural Gas - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Natural Gas Market is expected to register a CAGR of greater than 5% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently, the market has reached pre-pandemic levels.

Key Highlights

- Over the medium term, the growing demand for LNG is expected to stimulate the market growth of Europe's natural gas market. Furthermore, increasing investments are expected to drive the market's growth.
- On the other hand, Europe's focus on alternative energy sources is expected to hamper the growth of the Europe natural gas market during the forecast period.
- Nevertheless, increasing demand for LNG in the region leads to the integration of intelligent technologies in the existing LNG infrastructure are likely to create lucrative growth opportunities for the Europe natural gas market in the forecast period.
- Norway dominates the market, and it would likely witness the highest CAGR during the forecast period. This growth is attributed to the increasing investments and supportive government policies in the country to increase natural gas production.

Europe Natural Gas Market Trends

Upstream Sector to Witness Significant Growth

- Europe is home to some of the oldest oil-producing countries across the globe. The region is also one of the world's largest

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offshore oil and gas markets. Norway, the United Kingdom, and Russia are some of the major countries in the region's oil and gas industry.

- In 2021, Europe's natural gas production volume amounted to over 191,546 million standard cubic meters. The production decreased compared to the previous year.
- The region's upstream sector is expected to witness significant growth during the forecast period, owing to increasing investments in discoveries and production across Europe.
- For instance, in March 2022, the offshore exploration and production company IOG discovered a new gas field under the North Sea off the coast of East Anglia in the United Kingdom. The discovery aims to help the United Kingdom avoid skyrocketing prices.
- In recent years, companies previously involved in the oil and gas activities in the North Sea are becoming more focused on reducing greenhouse gas emissions from the industry. Further, European nations are seriously targeting to achieve the short-term goals set by European Union for 2030, which are significant steps in achieving zero carbon emissions by 2050. Overall, this has led to the creation of more carbon-neutral models with companies using various upstream technologies to reduce greenhouse gas emissions.
- Hence, the upstream sector in Europe is expected to witness significant growth due to its increasing exploration activities and the demand shown by countries in Europe for reliable natural gas.

Norway to Dominate the Market

- Norway witnessed a slowdown in oil and gas-related activities in recent years, mainly due to maturing oil and gas fields. The country has a vast oil and gas infrastructure ranging from oil and gas drilling and production platforms to pipeline networks.
- As of 2021, Norway is the world's third-largest exporter of natural gas, behind Russia and Qatar. The country has supplied 20-25% of the European Union and the United Kingdom's gas demand. This makes natural gas the most important export commodity in the Norwegian economy.
- Norway's natural gas production amounted to some 116,700 million standard cubic meters in 2021, up by 0.4% compared to the previous year. Norway's natural gas share of energy sources is expected to increase.
- Also, the country is a major natural gas exporter, requiring a significantly developed pipeline infrastructure to transport the gas to consumption hubs. As of July 2022, the gas pipeline length in Norway was about 8,800 km. About 95% of the Norwegian gas is transported through a network of subsea pipelines to other European countries, while around 5% is exported as LNG. This is transported by ship from the Melkoya facility in Hammerfest.
- In May 2022, Norwegian state-owned operator Gassco awarded a contract to engineering firm Wood to support secure gas transportation from the Norwegian Continental Shelf (NCS) to the United Kingdom and European countries. Under the three-year contract, Wood will work with Gassco to modernize the gas-receiving facilities. The company provides engineering, procurement, and construction management services for gas receiving terminals in Easington, UK; Zeebrugge, Belgium; Dunkerque, France; Dornum, Germany; and Emden, Germany. Therefore, the midstream sector in the country is expected to witness moderate growth during the forecast period.
- Therefore, increasing production of natural gas in Norway is expected to dominate the Europe natural gas market during the forecast period.

Europe Natural Gas Industry Overview

The Europe natural gas market is moderately fragmented in nature. Some of the major players in the market (in no particular order) include Chevron Corporation, BP PLC, Shell PLC, TotalEnergies SE, and Eni SpA.

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- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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