

## **Germany Refined Petroleum Products - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 95 pages | Mordor Intelligence

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### **Report description:**

The Germany Refined Petroleum Products Market is expected to register a CAGR of greater than 4% during the forecast period.

Over the medium term, the increasing consumption of refined petroleum products, increasing exports, and demand for refined petroleum products are factors expected to drive the growth of the market studied. On the other hand, the increasing adoption of alternative fuels is expected to restrain the German refined petroleum products market during the forecast period.

Nevertheless, the increasing demand for LPG from the petrochemical sector is expected to create lucrative growth opportunities for the German refined petroleum products market during the forecast period.

Germany Refined Petroleum Products Market Trends

Surging Consumption of Refined Petroleum Products

Diesel fuel and motor gasoline had a combined share of approximately 93% of German fuel consumption in 2021. The surging fuel consumption is expected to drive the demand for refined petroleum products in Germany. As per BP's Statistical Review of World Energy 2022, in 2021, Germany consumed about 2.05 million barrels of oil per day. Overall, oil consumption in the country has been mostly decreasing during the period in consideration. Germany is a heavy consumer of oil and natural gas. The demand for refined petroleum products is expected to witness significant growth during the forecast period.

As per the Federal Network Agency, German households and small industries account for 40% of consumption, while big manufacturing industries require 60% of the country's gas. Germany used 100 billion cubic meters of gas in 2021. In September

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2022, TotalEnergies SE awarded a contract with Bilfinger SE to deliver long-term integrated maintenance services focused on ensuring efficiency and sustainability at the operator's 227,000-b/d Leuna refinery in central Germany.

Furthermore, in September 2022, the German government announced that it is temporarily controlling two subsidiaries of the Russian energy giant Rosneft, including Rosneft Deutschland GmbH and RN Refining & Marketing GmbH. The move by the government puts it in charge of Rosneft's stakes in three refineries in the country. This includes a critical facility in the northeast of the country, which supplies around 90% of Berlin's fuel and in which Rosneft has a majority stake. This is expected to drive the use of German refined petroleum products during the forecast period.

Therefore, the growing consumption of refined petroleum products and the government's efforts to increase the refined petroleum products in the energy mix is expected to drive the German refined petroleum products market in the coming years.

#### Liquefied Petroleum Gas (LPG) to Witness Significant Growth

Liquid petroleum gas (LPG) products are used as motor fuel (autogas) and for heating in agriculture and industrial applications. Butane and propane are also often used as raw materials for various production purposes in the automotive, durable goods, and packaging industries. Rosneft Deutschland is one of Germany's largest producers of LPG (Liquefied petroleum gas). The company produces high-quality propane, butane, and LPG mix in the three refineries with Rosneft shareholding and supplies its customers in Germany and neighboring countries.

As per the Energy Information Administration statistics, the average LPG consumption in Germany recorded a minimum of 83.45 thousand barrels per day in 2002 and a maximum of 126.45 thousand barrels per day in 2017. The value from 2021 is 117.38 thousand barrels per day.

To meet the increasing LPG demand, as per the Federal Association of Independent Gas Stations statistics, Germany increased the number of LPG (autogas) filling stations from 6,852 in 2014 to 6,971 in 2021. The increase in the demand for autogas has led to growth in the expansion of autogas filling stations across the country.

Furthermore, in August 2022, Evonik Industries AG announced plans to diversify its energy sources at its manufacturing sites in Germany to make it less dependent on natural gas. The most significant measure is being implemented at Evonik's largest German site in Marl. In the new gas-fired power plant, liquefied petroleum gas (LPG) will be used instead of natural gas to generate energy. Therefore, the increasing demand for liquefied petroleum gas (LPG) is expected to lead to significant growth in the German refined petroleum products market during the forecast period.

#### Germany Refined Petroleum Products Industry Overview

The German refined petroleum products market is moderately fragmented in nature. Some of the major players in the market (in no particular order) are Rosneft Deutschland GmbH, Eni SpA, PCK Raffinerie GmbH, BP PLC, and Exxon Mobil Corporation.

#### Additional Benefits:

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

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