

# **Bio-LNG Market - A Global and Regional Analysis: Focus on Application, Source, and Region - Analysis and Forecast, 2023-2032**

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## **Abstracts**

### Global Bio-LNG Market: Industry Overview

The global bio-LNG market was valued at \$618.4 million in 2022 and is anticipated to reach \$3,607.2 million by 2032, witnessing a CAGR of 20.3% during the forecast period 2023-2032.

The demand for bio-LNG is anticipated to grow with the increasing demand from end-use industries such as automotives, ships, and others. Furthermore, it is anticipated that during the projected period of 2023-2032, there will be an increasing adoption of bio-LNG in the automobile industry, and several governments are expected to implement policies and incentives to encourage the production and use of bio-LNG in various regions. For instance, the European Union has been setting targets to increase the use of renewable energy in the transport sector. In addition, the European Union has introduced the Alternative Fuels Infrastructure Directive, which aims to support the development of infrastructure for alternative fuels such as bio-LNG. However, the high cost of bio-LNG as compared to LNG is anticipated to hinder market growth in the future.

### Market Lifecycle Stage

The global bio-LNG market is in the growth phase. Rising sales of vehicles and increasing focus on decarbonization and controlling pollutants are expected to boost the market growth. Furthermore, the increasing numbers of LNG trucks and rising environmental concerns are creating significant growth opportunities for bio-LNG. Bio-LNG is an inexhaustible substitute for conventional fuel and is one of the best options to

meet the rising need for energy while reducing greenhouse gas emissions. Therefore, owing to the aforementioned factors, its demand is increasing. Moreover, the global bio-LNG market is expected to benefit from favorable government policies, which are expected to promote market expansion. The requirement for bio-LNG is being stimulated by ships as well.

### Industrial Impact

Growing demand for decarbonization is the main driving force behind the growing consumer interest in bio-LNG. As a result, these fuels are getting prominence in a variety of industries, including buses, trucks, ships, and others. One area where their implementation has been significantly greater is trucks and ships, which is expected to create opportunities for both existing market participants and market entrants.

Furthermore, bio-LNG has a moderate to high impact on end-user industries; however, in the upcoming future, with increased production of automobiles, ships, and other applications, the impact is anticipated to increase.

### Impact of COVID-19

The bio-LNG market was affected moderately by COVID-19. The demand for energy in transportation and other industries has dramatically dropped because of business restrictions, travel bans, and border closures, which have led to a decrease in the use of bioenergy and other renewable sources. Similarly, disruptions in the transportation of raw materials and finished products have also impacted the bio-LNG supply chain. The pandemic has also impacted the funding of bio-LNG projects, as investors have become more cautious due to the uncertainty caused by the pandemic. Overall, the pandemic has had a significant impact on the bio-LNG market. It has also drawn attention to the significance of renewable energy sources and the necessity of resilience in the face of universal challenges.

### Market Segmentation:

#### Segmentation 1: by Application

Automotive

Ships

Others

Based on application, automotive led the global bio-LNG market in terms of value in 2022.

Segmentation 2: by Source

Agriculture Residues

Industrial Waste

Household Waste

Others

The global bio-LNG market was led by agriculture residues in terms of source by value in 2022.

Segmentation 3: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Netherlands, Italy, Scandinavian, and Rest-of-Europe

China

U.K.

Asia-Pacific and Japan - Japan, India, South Korea, Australia, and Rest-of-Asia-Pacific and Japan

Rest-of-the-World - South America, and Middle East and Africa

In the global bio-LNG market, Europe dominates the market owing to several bio-LNG production facilities already operational and more in the pipeline. This is due to several

factors, including the strong regulatory support for renewable energy and decarbonization in the region, the availability of feedstocks for bio-LNG production, and the high demand for low-carbon fuels in the transportation and shipping sectors.

### Recent Developments in the Global Bio-LNG Market

In February 2023, GREEN CREATE built manure-fed biomethane production facilities in Wijster, Netherlands. The plant produces renewable natural gas (RNG) from agricultural waste, specifically manure that can be further upgraded to bio-LNG, which can then be used as a low-carbon fuel in the transportation sector.

In February 2023, Liqvis announced migration to bio-LNG for heavy-duty transportation starting in 2023 as it broadens its range of bio-LNG suppliers. Beginning in mid-2023, Liqvis would gradually migrate to CO<sub>2</sub>-neutral bio-LNG and sell it as a substitute fuel at its refueling facilities.

In April 2023, the U.K.'s largest owner of bio-CNG and bio-LNG plants, Nottingham-based Roadgas, recently transferred its assets to Pretoria Energy Group, which is funded by Mercuria Clean Energy Investments. Roadgas provides customized on-site fuelling options using biomethane made in the U.K. Within five years, the firm aims to power more than 2,500 gas-fuelled trucks annually.

### Demand – Drivers and Limitations

The following are the demand drivers for the global bio-LNG market:

Rising Environmental Concerns

Increasing Number of LNG Trucks

The market is expected to face some limitations as well due to the following challenges:

Limited Availability of Feedstocks

## High Price of Bio-LNG as Compared to LNG

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader to understand the different sources involved in producing bio-LNG. Moreover, the study provides the reader with a detailed understanding of the global bio-LNG market based on the application (automotive, ships, and others). Bio-LNG is gaining traction in different applications on the back of sustainability concerns and less nitrogen oxide emissions. They are also being used for controlling greenhouse gas (GHG) emissions.

**Growth/Marketing Strategy:** The global bio-LNG market has seen major development by key players operating in the market, such as business expansions, partnerships, collaborations, mergers and acquisitions, and joint ventures. The favored strategy for the companies has been product developments, business expansions, and acquisitions to strengthen their position in the global bio-LNG market. For instance, in October 2022, Titan LNG announced a plan to produce around 200,000 tons of bio-LNG annually. At its location in the port of Amsterdam, Titan LNG is expected to construct and run the bio-LNG plant, enabling delivery to ships and trucks.

**Competitive Strategy:** Key players in the global bio-LNG market analyzed and profiled in the study involve bio-LNG manufacturers and the overall ecosystem. Moreover, a detailed competitive benchmarking of the players operating in the global bio-LNG market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

### Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts, analyzing company coverage, product portfolio, and market penetration.

The global bio-LNG market has been segmented by different application, among which automotive captured around 66% of the market as of 2022, ships accounted for around 29%, and other end-use industries accounted for around 5% of the total demand in 2022 in terms of value.

## Key Companies Profiled

TotalEnergies SE

Linde plc

MAKEEN Energy

Nordsol

BoxLNG Pvt. Ltd

Flogas Britain Limited

DBG Group B.V.

Gasum Ltd

RUHE Biogas Service GmbH

LIQVIS GmbH

Andion Global Inc.

Cycle0

Titan LNG

Alexela

EnviTec Biogas AG

Scandinavian Biogas Fuels International AB

Scale Gas Solutions

GREEN CREATE

Biomet SpA

Air Water Inc.

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