

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 CO₂-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.

Contents

1 MARKETS

1.1 Industry Outlook

1.1.1 Trends: Current and Future

1.1.1.1 Favorable Government Policies Supporting Bio-LNG Production

1.1.1.2 Rise in Fossil Fuel-Based Alternative Price

1.1.2 Supply Chain Analysis

1.1.3 Ecosystem/Ongoing Programs

1.1.3.1 Consortiums and Associations

1.1.3.2 Regulatory Bodies

1.1.3.3 Government Programs

1.1.3.4 Programs by Research Institutions and Universities

1.1.4 Impact of COVID-19 on the Bio-LNG Market

1.1.5 Impact of Russia-Ukraine Conflict on Bio-LNG Market

1.1.6 Comparative Analysis of Bio-LNG and its Substitutes

1.1.7 Snapshot of Green Methanol Market

1.1.7.1 Leading Countries in the Green Methanol Market

1.1.7.2 Leading Companies in Green Methanol Market

1.1.7.3 Green Methanol Projections

1.2 Business Dynamics

1.2.1 Business Drivers

1.2.1.1 Rising Environmental Concerns

1.2.1.2 Increasing Number of LNG Trucks

1.2.2 Business Challenges

1.2.2.1 Limited Availability of Feedstocks

1.2.2.2 High Price of Bio-LNG as Compared to LNG

1.2.3 Business Strategies

1.2.3.1 Product Developments

1.2.3.2 Market Developments

1.2.4 Corporate Strategies

1.2.4.1 Mergers and Acquisitions

1.2.4.2 Partnerships and Joint Ventures

1.2.5 Business Opportunities

1.2.5.1 Increase in Demand from Shipping Industry

1.2.5.2 Technological Advancement

1.3 Start-Up Landscape

1.3.1 Key Start-Ups in the Ecosystem

2 APPLICATION

2.1 Bio-LNG Market (Applications and Specifications)

2.1.1 Bio-LNG Market (by Application)

2.1.1.1 Automotives

2.1.1.1.1 Trucks

2.1.1.1.2 Buses

2.1.1.1.3 Others

2.1.2 Ships

2.1.3 Others

2.2 Demand Analysis of Bio-LNG Market (by Application), Value and Volume Data

3 PRODUCTS

3.1 Global Bio-LNG Market (Source & Specifications)

3.1.1 Global Bio-LNG Market (by Source)

3.1.1 Agricultural Residues

3.1.2 Industrial Waste

3.1.3 Household Waste

3.1.4 Others

3.2 Demand Analysis of Bio-LNG Market (by Source), Value and Volume Data

3.3 Product Benchmarking: Growth Rate – Market Share Matrix, by Source, 2022, Product Benchmarking (by Source)

3.4 Patent Analysis

3.4.1 Patent Analysis (by Status)

3.4.2 Patent Analysis (by Organization)

3.5 Global and Regional Level: Average Pricing Analysis, Bio-LNG

4 REGIONS

4.1 North America

4.1.1 Market

4.1.1.1 Key Producers and Suppliers in North America

4.1.1.2 Business Drivers

4.1.1.3 Business Challenges

4.1.2 Application

4.1.2.1 North America Bio-LNG Market (by Application), Volume and Value Data

4.1.3 Product

- 4.1.3.1 North America Bio-LNG Market (by Source), Volume and Value Data
- 4.1.4 North America (by Country)
 - 4.1.4.1 U.S.
 - 4.1.4.1.1 Market
 - 4.1.4.1.1.1 Buyer Attributes
 - 4.1.4.1.1.2 Key Producers and Suppliers in the U.S.
 - 4.1.4.1.1.3 Regulatory Landscape
 - 4.1.4.1.1.4 Business Drivers
 - 4.1.4.1.1.5 Business Challenges
 - 4.1.4.1.2 Application
 - 4.1.4.1.2.1 U.S. Bio-LNG Market (by Application), Volume and Value Data
 - 4.1.4.1.3 Product
 - 4.1.4.1.3.1 U.S. Bio-LNG Market (by Source), Volume and Value Data
 - 4.1.4.2 Canada
 - 4.1.4.2.1 Market
 - 4.1.4.2.1.1 Buyer Attributes
 - 4.1.4.2.1.2 Key Producers and Suppliers in Canada
 - 4.1.4.2.1.3 Regulatory Landscape
 - 4.1.4.2.1.4 Business Drivers
 - 4.1.4.2.1.5 Business Challenges
 - 4.1.4.2.2 Application
 - 4.1.4.2.2.1 Canada Bio-LNG Market (by Application), Volume and Value Data
 - 4.1.4.2.3 Product
 - 4.1.4.2.3.1 Canada Bio-LNG Market (by Source), Volume and Value Data
 - 4.1.4.3 Mexico
 - 4.1.4.3.1 Market
 - 4.1.4.3.1.1 Buyer Attributes
 - 4.1.4.3.1.2 Key Producers and Suppliers in Mexico
 - 4.1.4.3.1.3 Regulatory Landscape
 - 4.1.4.3.1.4 Business Drivers
 - 4.1.4.3.1.5 Business Challenges
 - 4.1.4.3.2 Application
 - 4.1.4.3.2.1 Mexico Bio-LNG Market (by Application), Volume and Value Data
 - 4.1.4.3.3 Product
 - 4.1.4.3.3.1 Mexico Bio-LNG Market (by Source), Volume and Value Data
- 4.2 Europe
 - 4.2.1 Markets
 - 4.2.1.1 Key Producers/ Suppliers in Europe
 - 4.2.1.2 Business Drivers

4.2.1.3 Business Challenges

4.2.2 Application

4.2.2.1 Europe Bio-LNG Market (by Application), Volume and Value Data

4.2.3 Product

4.2.3.1 Europe Bio-LNG Market (by Source), Volume and Value Data

4.2.4 Europe (by Country)

4.2.4.1 Germany

4.2.4.1.1 Market

4.2.4.1.1.1 Buyer Attributes

4.2.4.1.1.2 Key Producers and Suppliers in Germany

4.2.4.1.1.3 Regulatory Landscape

4.2.4.1.1.4 Business Drivers

4.2.4.1.1.5 Business Challenges

4.2.4.1.2 Application

4.2.4.1.2.1 Germany Bio-LNG Market (by Application), Volume and Value Data

4.2.4.1.3 Products

4.2.4.1.3.1 Germany Bio-LNG Market (by Source), Volume and Value Data

4.2.4.2 France

4.2.4.2.1 Market

4.2.4.2.1.1 Buyer Attributes

4.2.4.2.1.2 Key Producers and Suppliers in France

4.2.4.2.1.3 Regulatory Landscape

4.2.4.2.1.4 Business Drivers

4.2.4.2.1.5 Business Challenges

4.2.4.2.2 Application

4.2.4.2.2.1 France Bio-LNG Market (by Application), Volume and Value Data

4.2.4.2.3 Product

4.2.4.2.3.1 France Bio-LNG Market (by Source), Volume and Value Data

4.2.4.3 Netherlands

4.2.4.3.1 Markets

4.2.4.3.1.1 Buyer Attributes

4.2.4.3.1.2 Key Producers and Suppliers in the Netherlands

4.2.4.3.1.3 Regulatory Landscape

4.2.4.3.1.4 Business Drivers

4.2.4.3.1.5 Business Challenges

4.2.4.3.2 Application

4.2.4.3.2.1 Netherlands Bio-LNG Market (by Application), Volume and Value Data

4.2.4.3.3 Product

4.2.4.3.3.1 Netherlands Bio-LNG Market (by Source), Volume and Value Data

4.2.4.4 Italy

4.2.4.4.1 Market

4.2.4.4.1.1 Buyer Attributes

4.2.4.4.1.2 Key Producers and Suppliers in Italy

4.2.4.4.1.3 Regulatory Landscape

4.2.4.4.1.4 Business Drivers

4.2.4.4.1.5 Business Challenges

4.2.4.4.2 Application

4.2.4.4.2.1 Italy Bio-LNG Market (by Application), Volume and Value Data

4.2.4.4.3 Product

4.2.4.4.3.1 Italy Bio-LNG Market (by Source), Volume and Value Data

4.2.4.5 Scandinavian

4.2.4.5.1 Market

4.2.4.5.1.1 Buyer Attributes

4.2.4.5.1.2 Key Producers and Suppliers in Scandinavian

4.2.4.5.1.3 Regulatory Landscape

4.2.4.5.1.4 Business Drivers

4.2.4.5.1.5 Business Challenges

4.2.4.5.2 Application

4.2.4.5.2.1 Scandinavian Bio-LNG Market (by Application), Volume and Value Data

4.2.4.5.3 Product

4.2.4.5.3.1 Scandinavian Bio-LNG Market (by Source), Volume and Value Data

4.2.4.6 Rest-of-Europe (RoE)

4.2.4.6.1 Market

4.2.4.6.1.1 Buyer Attributes

4.2.4.6.1.2 Key Producers and Suppliers in Rest-of-Europe

4.2.4.6.1.3 Business Drivers

4.2.4.6.1.4 Business Challenges

4.2.4.6.2 Application

4.2.4.6.2.1 Rest-of-Europe Bio-LNG Market (by Application), Volume and Value

Data

4.2.4.6.3 Product

4.2.4.6.3.1 Rest-of-Europe Bio-LNG Market (by Source), Volume and Value Data

4.3 U.K.

4.3.1 Market

4.3.1.1 Buyer Attributes

4.3.1.2 Key Producers and Suppliers in the U.K.

4.3.1.3 Regulatory Landscape

4.3.1.4 Business Drivers

- 4.3.1.5 Business Challenges
- 4.3.2 Application
 - 4.3.2.1 U.K. Bio-LNG Market (by Application), Volume and Value Data
- 4.3.3 Product
 - 4.3.3.1 U.K. Bio-LNG Market (by Source), Volume and Value Data
- 4.4 China
 - 4.4.1 Market
 - 4.4.1.1 Buyer Attributes
 - 4.4.1.2 Key Producers and Suppliers in China
 - 4.4.1.3 Regulatory Landscape
 - 4.4.1.4 Business Drivers
 - 4.4.1.5 Business Challenges
 - 4.4.2 Application
 - 4.4.2.1 China Bio-LNG Market (by Application), Volume and Value Data
 - 4.4.3 Product
 - 4.4.3.1 China Bio-LNG Market (by Source), Volume and Value Data
- 4.5 Asia-Pacific and Japan
 - 4.5.1 Markets
 - 4.5.1.1 Key Producers/Suppliers in Asia-Pacific and Japan
 - 4.5.1.2 Business Drivers
 - 4.5.1.3 Business Challenges
 - 4.5.2 Application
 - 4.5.2.1 Asia-Pacific and Japan Bio-LNG Market (by Application), Volume and Value Data
 - 4.5.3 Product
 - 4.5.3.1 Asia-Pacific and Japan Bio-LNG Market (by Source), Volume and Value Data
 - 4.5.4 Asia-Pacific and Japan (by Country)
 - 4.5.4.1 Japan
 - 4.5.4.1.1 Market
 - 4.5.4.1.1.1 Buyer Attributes
 - 4.5.4.1.1.2 Key Producers and Suppliers in Japan
 - 4.5.4.1.1.3 Regulatory Landscape
 - 4.5.4.1.1.4 Business Drivers
 - 4.5.4.1.1.5 Business Challenges
 - 4.5.4.1.2 Application
 - 4.5.4.1.2.1 Japan Bio-LNG Market (by Application), Volume and Value Data
 - 4.5.4.1.3 Product
 - 4.5.4.1.3.1 Japan Bio-LNG Market (by Source), Volume and Value Data
 - 4.5.4.2 South Korea

- 4.5.4.2.1 Market
 - 4.5.4.2.1.1 Buyer Attributes
 - 4.5.4.2.1.2 Key Producers and Suppliers in South Korea
 - 4.5.4.2.1.3 Regulatory Landscape
 - 4.5.4.2.1.4 Business Drivers
 - 4.5.4.2.1.5 Business Challenges
- 4.5.4.2.2 Application
 - 4.5.4.2.2.1 South Korea Bio-LNG Market (by Application), Volume and Value Data
- 4.5.4.2.3 Product
 - 4.5.4.2.3.1 South Korea Bio-LNG Market (by Source), Volume and Value Data
- 4.5.4.3 India
 - 4.5.4.3.1 Markets
 - 4.5.4.3.1.1 Buyer Attributes
 - 4.5.4.3.1.2 Key Producers/ Suppliers in India
 - 4.5.4.3.1.3 Regulatory Landscape
 - 4.5.4.3.1.4 Business Drivers
 - 4.5.4.3.1.5 Business Challenges
 - 4.5.4.3.2 Application
 - 4.5.4.3.2.1 India Bio-LNG Market (by Application), Volume and Value Data
 - 4.5.4.3.3 Product
 - 4.5.4.3.3.1 India Bio-LNG Market (by Source), Volume and Value Data
- 4.5.4.4 Australia
 - 4.5.4.4.1 Markets
 - 4.5.4.4.1.1 Buyer Attributes
 - 4.5.4.4.1.2 Key Producers/ Suppliers in Australia
 - 4.5.4.4.1.3 Regulatory Landscape
 - 4.5.4.4.1.4 Business Drivers
 - 4.5.4.4.1.5 Business Challenges
 - 4.5.4.4.2 Application
 - 4.5.4.4.2.1 Australia Bio-LNG Market (by Application), Volume and Value Data
 - 4.5.4.4.3 Product
 - 4.5.4.4.3.1 Australia Bio-LNG Market (by Source), Volume and Value Data
- 4.5.4.5 Rest-of-Asia-Pacific and Japan
 - 4.5.4.5.1 Markets
 - 4.5.4.5.1.1 Buyer Attributes
 - 4.5.4.5.1.2 Key Producers/ Suppliers in the Rest-of-Asia-Pacific and Japan
 - 4.5.4.5.1.3 Business Drivers
 - 4.5.4.5.1.4 Business Challenges
 - 4.5.4.5.2 Application

4.5.4.5.2.1 Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Application),
Volume and Value Data

4.5.4.5.3 Product

4.5.4.5.3.1 Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Source), Volume
and Value Data

4.6 Rest-of-the-World

4.6.1 Market

4.6.1.1 Key Producers and Suppliers in Rest-of-the-World

4.6.1.2 Business Drivers

4.6.1.3 Business Challenges

4.6.2 Application

4.6.2.1 Rest-of-the-World Bio-LNG Market (by Application), Volume and Value Data

4.6.3 Product

4.6.3.1 Rest-of-the-World Bio-LNG Market (by Source), Volume and Value Data

4.6.4 Rest-of-the-World (by Country)

4.6.4.1 South America

4.6.4.1.1 Market

4.6.4.1.1.1 Buyer Attributes

4.6.4.1.1.2 Key Producers/Suppliers in South America

4.6.4.1.1.3 Regulatory Landscape

4.6.4.1.1.4 Business Drivers

4.6.4.1.1.5 Business Challenges

4.6.4.2 Application

4.6.4.2.1 South America Bio-LNG Market (by Application), Volume and Value Data

4.6.4.3 Product

4.6.4.3.1 South America Bio-LNG Market (by Source), Volume and Value Data

4.6.4.4 Middle East and Africa

4.6.4.4.1 Market

4.6.4.4.1.1 Buyer Attributes

4.6.4.4.1.2 Key Producers and Suppliers in the Middle East and Africa

4.6.4.4.1.3 Regulatory Landscape

4.6.4.4.1.4 Business Drivers

4.6.4.4.1.5 Business Challenges

4.6.4.5 Application

4.6.4.5.1 Middle East and Africa Bio-LNG Market (by Application), Volume and
Value Data

4.6.4.6 Product

4.6.4.6.1 Middle East and Africa Bio-LNG Market (by Source), Volume and Value
Data

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

5.1 Competitive Benchmarking

5.1.1 Competitive Position Matrix

5.1.2 Product Matrix for Key Companies, By Source

5.1.3 Market Share Analysis of Key Companies, 2022

5.2 Company Profiles

5.2.1 TotalEnergies SE

5.2.1.1 Company Overview

5.2.1.2 Role of TotalEnergies SE in the Bio-LNG Market

5.2.1.3 Product Portfolio

5.2.1.4 Production Sites

5.2.1.5 Business Strategies

5.2.1.5.1 Market Developments

5.2.1.6 Corporate Strategies

5.2.1.6.1 Mergers, Acquisitions, Partnerships, and Joint Ventures

5.2.1.7 R&D Analysis

5.2.1.8 Analyst View

5.2.2 Linde plc

5.2.2.1 Company Overview

5.2.2.2 Role of Linde plc in the Bio-LNG Market

5.2.2.3 Product Portfolio

5.2.2.4 Production Sites

5.2.2.5 Business Strategies

5.2.2.5.1 Market Developments

5.2.2.6 R&D Analysis

5.2.2.7 Analyst View

5.2.3 MAKEEN Energy

5.2.3.1 Company Overview

5.2.3.2 Role of MAKEEN Energy in the Bio-LNG Market

5.2.3.3 Product Portfolio

5.2.3.4 Production Site

5.2.3.4.1 Market Developments

5.2.3.5 Analyst View

5.2.4 Nordsol

5.2.4.1 Company Overview

5.2.4.2 Role of Nordsol in the Bio-LNG Market

5.2.4.3 Product Portfolio

- 5.2.4.4 Production Site
- 5.2.4.5 Business Strategies
 - 5.2.4.5.1 Market Developments
- 5.2.4.6 Corporate Strategies
 - 5.2.4.6.1 Mergers, Acquisitions, Partnerships, and Joint Ventures
- 5.2.4.7 Analyst View
- 5.2.5 BoxLNG Pvt. Ltd
 - 5.2.5.1 Company Overview
 - 5.2.5.2 Role of BoxLNG Pvt. Ltd in the Bio-LNG Market
 - 5.2.5.3 Product Portfolio
 - 5.2.5.4 Production Site
 - 5.2.5.5 Corporate Strategies
 - 5.2.5.5.1 Mergers, Acquisitions, Partnerships, and Joint Ventures
 - 5.2.5.6 Analyst View
- 5.2.6 Flogas Britain Limited
 - 5.2.6.1 Company Overview
 - 5.2.6.2 Role of Flogas Britain Limited in the Bio-LNG Market
 - 5.2.6.3 Product Portfolio
 - 5.2.6.4 Production Site
 - 5.2.6.5 Business Strategies
 - 5.2.6.5.1 Product Developments
 - 5.2.6.6 Analyst View
- 5.2.7 DBG Group B.V.
 - 5.2.7.1 Company Overview
 - 5.2.7.2 Role of DBG Group B.V. in the Bio-LNG Market
 - 5.2.7.3 Product Portfolio
 - 5.2.7.4 Production Site
 - 5.2.7.5 Business Strategies
 - 5.2.7.5.1 Product Developments
 - 5.2.7.6 Analyst View
- 5.2.8 Gasum Ltd
 - 5.2.8.1 Company Overview
 - 5.2.8.2 Role of Gasum Ltd in the Bio-LNG Market
 - 5.2.8.3 Product Portfolio
 - 5.2.8.4 Production Site
 - 5.2.8.5 Business Strategies
 - 5.2.8.5.1 Product Developments
 - 5.2.8.6 Analyst View
- 5.2.9 RUHE Biogas Service GmbH

- 5.2.9.1 Company Overview
- 5.2.9.2 Role of RUHE Biogas Service GmbH in the Bio-LNG Market
- 5.2.9.3 Product Portfolio
- 5.2.9.4 Production Site
- 5.2.9.5 Business Strategies
 - 5.2.9.5.1 Product Developments
- 5.2.9.6 Analyst View
- 5.2.10 LIQVIS GmbH
 - 5.2.10.1 Company Overview
 - 5.2.10.2 Role of LIQVIS GmbH in the Bio-LNG Market
 - 5.2.10.3 Product Portfolio
 - 5.2.10.4 Production Site
 - 5.2.10.5 Analyst View
- 5.2.11 Andion Global Inc.
 - 5.2.11.1 Company Overview
 - 5.2.11.2 Role of Andion Global Inc. in the Bio-LNG Market
 - 5.2.11.3 Product Portfolio
 - 5.2.11.4 Production Site
 - 5.2.11.5 Business Strategies
 - 5.2.11.5.1 Product Developments
 - 5.2.11.6 Analyst View
- 5.2.12 Cycle0
 - 5.2.12.1 Company Overview
 - 5.2.12.2 Role of Cycle0 in the Bio-LNG Market
 - 5.2.12.3 Product Portfolio
 - 5.2.12.4 Production Site
 - 5.2.12.5 Business Strategies
 - 5.2.12.5.1 Product Developments
 - 5.2.12.6 Analyst View
- 5.2.13 Titan LNG
 - 5.2.13.1 Company Overview
 - 5.2.13.2 Role of Titan LNG in the Bio-LNG Market
 - 5.2.13.3 Product Portfolio
 - 5.2.13.4 Production Site
 - 5.2.13.5 Business Strategies
 - 5.2.13.5.1 Product Developments
 - 5.2.13.6 Analyst View
- 5.2.14 Alexela
 - 5.2.14.1 Company Overview

- 5.2.14.2 Role of Alexela in the Bio-LNG Market
- 5.2.14.3 Product Portfolio
- 5.2.14.4 Production Site
- 5.2.14.5 Business Strategies
 - 5.2.14.5.1 Product Developments
- 5.2.14.6 Analyst View
- 5.2.15 EnviTec Biogas AG
 - 5.2.15.1 Company Overview
 - 5.2.15.2 Role of EnviTec Biogas AG in the Bio-LNG Market
 - 5.2.15.3 Product Portfolio
 - 5.2.15.4 Production Site
 - 5.2.15.5 Business Strategies
 - 5.2.15.5.1 Product Developments
 - 5.2.15.6 Analyst View
- 5.2.16 Scandinavian Biogas Fuels International AB
 - 5.2.16.1 Company Overview
 - 5.2.16.2 Role of Scandinavian Biogas Fuels International AB in the Bio-LNG Market
 - 5.2.16.3 Product Portfolio
 - 5.2.16.4 Production Site
 - 5.2.16.5 Business Strategies
 - 5.2.16.5.1 Product Developments
 - 5.2.16.6 Analyst View
- 5.2.17 Scale Gas Solutions
 - 5.2.17.1 Company Overview
 - 5.2.17.2 Role of Scale Gas Solutions in the Bio-LNG Market
 - 5.2.17.3 Product Portfolio
 - 5.2.17.4 Production Sites
 - 5.2.17.5 Analyst View
- 5.2.18 GREEN CREATE
 - 5.2.18.1 Company Overview
 - 5.2.18.2 Role of GREEN CREATE in the Bio-LNG Market
 - 5.2.18.3 Product Portfolio
 - 5.2.18.4 Production Site
 - 5.2.18.5 Business Strategies
 - 5.2.18.5.1 Product Developments
 - 5.2.18.6 Analyst View
- 5.2.19 Biomet SpA
 - 5.2.19.1 Company Overview
 - 5.2.19.2 Role of Biomet SpA in the Bio-LNG Market

5.2.19.3 Product Portfolio

5.2.19.4 Production Site

5.2.19.5 Business Strategies

5.2.19.5.1 Product Developments

5.2.19.6 Analyst View

5.2.20 Air Water Inc.

5.2.20.1 Company Overview

5.2.20.2 Role of Air Water Inc. in the Bio-LNG Market

5.2.20.3 Product Portfolio

5.2.20.4 Production Site

5.2.20.5 Business Strategies

5.2.20.5.1 Product Developments

5.2.20.6 Analyst View

6 RESEARCH METHODOLOGY

List Of Figures

LIST OF FIGURES

- Figure 1: Global Bio-LNG Market, \$Million, 2022, 2023, and 2032
- Figure 2: Global Bio-LNG Market (by Application), \$Million, 2022, 2032
- Figure 3: Global Bio-LNG Market (by Source), \$Million, 2022, 2032
- Figure 4: Global Bio-LNG Market (by Region), \$Million, 2022, 2032
- Figure 5: Bio-LNG Market Coverage
- Figure 6: Conventional Fuel Prices, 2020, 2021
- Figure 7: Supply Chain Analysis of Bio-LNG Market
- Figure 8: Green Methanol Market Snapshot
- Figure 9: Global CO2 Emissions from Transport by Subsector, 2020, (%)
- Figure 10: New Registrations of Medium and Heavy Trucks Over 3.5 Tons by Fuel Type in the EU in 2020
- Figure 11: Bio-LNG Market (by Application)
- Figure 12: Total Year-Wise Patents Filed for Global Bio-LNG Market, January 2019-December 2022
- Figure 13: Patent Analysis (by Status), January 2019-December 2022
- Figure 14: Patent Analysis (by Organization), January 2019-December 2022
- Figure 15: R&D Expenditure: TotalEnergies SE, 2020-2022
- Figure 16: R&D Expenditure: Linde plc, 2019-2021
- Figure 17: Research Methodology
- Figure 18: Top-Down and Bottom-Up Approach
- Figure 19: Bio-LNG Market Influencing Factors
- Figure 20: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1:	12. List of Consortiums and Associations
Table 2:	12. List of Regulatory Bodies
Table 3:	12. List of Government Programs
Table 4:	12. List of Programs by Research Institutions and Universities
Table 5:	Key Product Developments
Table 6:	Key Market Developments
Table 7:	Key Mergers and Acquisitions
Table 8:	Key Partnerships and Joint Ventures
Table 9:	The below-given table depicts the recent advances in bio-LNG in trucks.
Table 10:	Global Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 11:	Global Bio-LNG Market (by Application), \$Million, 2022-2032
Table 12:	Global Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 13:	Global Bio-LNG Market (by Source), \$Million, 2022-2032
Table 14:	Bio-LNG: Global Level- Average Pricing Analysis, (\$/Kg), 2022-2032
Table 15:	Bio-LNG: Average Pricing Analysis (by Region), (\$/Kg), 2022-2032
Table 16:	Global Bio-LNG Market (by Region), Kilo Tons, 2022-2032
Table 17:	Global Bio-LNG Market (by Region), \$Million, 2022-2032
Table 18:	North America Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 19:	North America Bio-LNG Market (by Application), \$Million, 2022-2032
Table 20:	North America Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 21:	North America Bio-LNG Market (by Source), \$Million, 2022-2032
Table 22:	U.S. Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 23:	U.S. Bio-LNG Market (by Application), \$Million, 2022-2032
Table 24:	U.S. Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 25:	U.S. Bio-LNG Market (by Source), \$Million, 2022-2032
Table 26:	Canada Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 27:	Canada Bio-LNG Market (by Application), \$Million, 2022-2032
Table 28:	Canada Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 29:	Canada Bio-LNG Market (by Source), \$Million, 2022-2032
Table 30:	Mexico Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 31:	Mexico Bio-LNG Market (by Application), \$Million, 2022-2032
Table 32:	Mexico Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 33:	Mexico Bio-LNG Market (by Source), \$Million, 2022-2032
Table 34:	Europe Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 35:	Europe Bio-LNG Market (by Application), \$Million, 2022-2032

Table 36: Europe Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 37: Europe Bio-LNG Market (by Source), \$Million, 2022-2032
Table 38: Germany Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 39: Germany Bio-LNG Market (by Application), \$Million, 2022-2032
Table 40: Germany Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 41: Germany Bio-LNG Market (by Source), \$Million, 2022-2032
Table 42: France Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 43: France Bio-LNG Market (by Application), \$Million, 2022-2032
Table 44: France Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 45: France Bio-LNG Market (by Source), \$Million, 2022-2032
Table 46: Netherlands Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 47: Netherlands Bio-LNG Market (by Application), \$Million, 2022-2032
Table 48: Netherlands Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 49: Netherlands Bio-LNG Market (by Source), \$Million, 2022-2032
Table 50: Italy Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 51: Italy Bio-LNG Market (by Application), \$Million, 2022-2032
Table 52: Italy Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 53: Italy Bio-LNG Market (by Source), \$Million, 2022-2032
Table 54: Scandinavian Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 55: Scandinavian Bio-LNG Market (by Application), \$Million, 2022-2032
Table 56: Scandinavian Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 57: Scandinavian Bio-LNG Market (by Source), \$Million, 2022-2032
Table 58: Rest-of-Europe Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 59: Rest-of-Europe Bio-LNG Market (by Application), \$Million, 2022-2032
Table 60: Rest-of-Europe Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 61: Rest-of-Europe Bio-LNG Market (by Source), \$Million, 2022-2032
Table 62: U.K. Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 63: U.K. Bio-LNG Market (by Application), \$Million, 2022-2032
Table 64: U.K. Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 65: U.K. Bio-LNG Market (by Source), \$Million, 2022-2032
Table 66: China Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 67: China Bio-LNG Market (by Application), \$Million, 2022-2032
Table 68: China Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 69: China Bio-LNG Market (by Source), \$Million, 2022-2032
Table 70: Asia-Pacific and Japan Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 71: Asia-Pacific and Japan Bio-LNG Market (by Application), \$Million, 2022-2032
Table 72: Asia-Pacific and Japan Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 73: Asia-Pacific and Japan Bio-LNG Market (by Source), \$Million, 2022-2032

Table 74: Japan Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 75: Japan Bio-LNG Market (by Application), \$Million, 2022-2032
Table 76: Japan Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 77: Japan Bio-LNG Market (by Source), \$Million, 2022-2032
Table 78: South Korea Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 79: South Korea Bio-LNG Market (by Application), \$Million, 2022-2032
Table 80: South Korea Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 81: South Korea Bio-LNG Market (by Source), \$Million, 2022-2032
Table 82: India Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 83: India Bio-LNG Market (by Application), \$Million, 2022-2032
Table 84: India Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 85: India Bio-LNG Market (by Source), \$Million, 2022-2032
Table 86: Australia Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 87: Australia Bio-LNG Market (by Application), \$Million, 2022-2032
Table 88: Australia Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 89: Australia Bio-LNG Market (by Source), \$Million, 2022-2032
Table 90: Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 91: Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Application), \$Million, 2022-2032
Table 92: Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 93: Rest-of-Asia-Pacific and Japan Bio-LNG Market (by Source), \$Million, 2022-2032
Table 94: Rest-of-the-World Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 95: Rest-of-the-World Bio-LNG Market (by Application), \$Million, 2022-2032
Table 96: Rest-of-the-World Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 97: Rest-of-the-World Bio-LNG Market (by Source), \$Million, 2022-2032
Table 98: South America Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 99: South America Bio-LNG Market (by Application), \$Million, 2022-2032
Table 100: South America Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 101: South America Bio-LNG Market (by Source), \$Million, 2022-2032
Table 102: Middle East and Africa Bio-LNG Market (by Application), Kilo Tons, 2022-2032
Table 103: Middle East and Africa Bio-LNG Market (by Application), \$Million, 2022-2032
Table 104: Middle East and Africa Bio-LNG Market (by Source), Kilo Tons, 2022-2032
Table 105: Middle East and Africa Bio-LNG Market (by Source), \$Million, 2022-2032
Table 106: Product Matrix for Key Companies, By Source
Table 107: Market Share of Key Companies, 2022

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