

Landfill Gas Capture and Utilization Market: A Global and Regional Analysis, 2023-2033

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Abstracts

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Landfill Gas Capture and Utilization Market Overview

The landfill gas capture and utilization market was valued at \$3.06 billion in 2023, and it is expected to grow at a CAGR of 7.18% and reach \$6.13 billion by 2033. The market is at a nascent stage and is projected to experience steady growth. Market players investing in research, infrastructure, and partnerships are expected to capitalize on the increasing demand for the landfill gas capture and utilization industry.

Market Lifecycle Stage

Landfill gas capture and utilization involves the extraction of landfill gas from landfills and processing it to get different products. The term "landfill gas capture and utilization" is used for reducing carbon (CO₂) and methane (CH₄) emissions generated from landfills. Landfill gas-to-energy projects involve different components such as wells, pipelines, turbines, sensors, generators, and others. It represents a creative and environmentally beneficial use of the gases produced naturally during the decomposition of organic material in landfills.

The global landscape showcases a substantial number of operational landfill gas-to-energy initiatives, underscoring the technology's viability and extensive adoption. This widespread implementation, as evidenced by significant investments from both municipal bodies and private entities, reflects a robust market endorsement of these systems.

The landfill gas capture and utilization market is further fueled by the demand for renewable natural gas and actions taken to achieve sustainability targets. Technological innovation, Material advancements, cost considerations, production scale-up challenges, and collaborations shape its dynamics. The demand for landfill gas capture and utilization plants to be stable and predictable, aligned with the generation of landfill waste and the need for renewable energy sources.

Impact:

The demand for renewable energy sources is boosting the deployment of landfill gas capture and utilization plants on a strong upward trajectory, fueled by stringent climate change objectives and the rising costs of traditional fossil fuels. Cities at the forefront of technological advancement are embracing innovative approaches to transform landfill gas into energy. Furthermore, these urban centers are actively investigating additional technologies to enhance their energy solutions, with a particular focus on waste-to-energy incineration and anaerobic digestion processes.

In the realm of landfill gas capture and utilization, the imposition of rigorous regulatory frameworks by governmental authorities represents a notable opportunity. These regulations are typically designed to elevate safety protocols, augment efficiency, and mitigate environmental footprints. Specifically, in the context of landfill gas capture and utilization, enhanced regulatory measures could necessitate a more effective transformation of landfill gas into renewable energy sources, fuels, and other eco-friendly products, thereby opening avenues for market growth and innovation.

Market Segmentation:

Segmentation 1: by Application

Electricity Generation

Thermal/Heat Generation

Fuels

Among the applications, the electricity generation segment plays a pivotal role in dominating the landfill gas capture and utilization market due to its high demand and sustainable way of electricity generation. Landfill gas utilization in electricity generation,

notably through internal combustion and reciprocating engines for smaller-scale endeavors and gas turbines for more extensive operations, is expected to bolster sustainable waste management practices. This approach is expected to strengthen the production of clean, renewable energy, driving forward environmental sustainability goals. These landfill gas-to-electricity projects are propelling a surge in robust and eco-friendly energy solutions.

Segmentation 2: by Product Type

Landfill Gas (Direct)

Medium-Btu

Renewable Natural Gas

Among the various product types, landfill gas (direct) happens to be a predominant segment in the landfill gas capture and utilization market. Harnessing landfill gas for direct electricity generation emerges as the best way to manage organic waste decomposition sustainably. This method, while common and effective, faces variability in gas composition, potentially impacting the efficiency of power generation systems. Nevertheless, its application in industrial boilers or furnaces, as a replacement for conventional fossil fuels, significantly boosts the reduction of greenhouse gas emissions. The robust approach of using landfill gas directly not only strengthens local, renewable energy sources but also propels a surge in sustainable waste management practices, bolstering environmental conservation efforts.

Segmentation 3: by Region

North America

Europe

Asia-Pacific

Rest-of-the-World

The landfill gas capture and utilization market is expected to be dominated by the North

America region. This projection stems from various factors, including the region's technological advancements, the number of operational landfills, and the presence of key manufacturing hubs. The region's focus on reducing greenhouse gases and achieving carbon neutrality targets is expected to boost the landfill gas capture and utilization market. Additionally, the established technological progress, industrial infrastructure, and proactive government initiatives support the building of new landfill gas-to-energy projects. Collaborations between landfill gas capture and utilization companies and local suppliers in North America foster technological advancements, leading to enhanced landfill gas extraction techniques and capabilities.

Recent Developments in the Landfill Gas Capture and Utilization Market

In August 2022, BP p.l.c (Archaea Energy) expanded its business collaboration with ?nergir, solidifying a new 20-year agreement focused on renewable natural gas. This long-term partnership marks a significant step in their joint commitment to sustainability and renewable energy solutions.

In November 2023, Walker Industries launched Ontario's most substantial Renewable Natural Gas project utilizing landfill sources, marking a significant stride in sustainable energy development in the region.

In November 2020, Veolia, in collaboration with Waga Energy, initiated Europe's most ambitious landfill gas-to-renewable natural gas (RNG) conversion project. This groundbreaking initiative stands as a leading example of sustainable energy innovation in the European market.

In February 2022, TotalEnergies and Veolia partnered with a focus on converting waste-processing facilities and wastewater treatment plants into biomethane sources in over 15 countries, which is expected to bolster robust energy solutions, propelling a surge in sustainable energy production.

Demand - Drivers and Limitations

The following are the demand drivers for the landfill gas capture and utilization market:

Stringent Regulations and Carbon Neutrality Targets

Rising Renewable Energy Demand

Increased Waste Generation

The following are the limitations of the landfill gas capture and utilization market:

Higher Upfront Cost of Landfill Gas Capture and Utilization

Lack of Regulations and Policies for Landfill Gas Projects

How can this report add value to an organization?

Product/Innovation Strategy: The product strategy helps the readers understand the different aftermarket solutions provided by the industry participants.

Growth/Marketing Strategy: The landfill gas capture and utilization market is growing at a significant pace and holds enormous opportunities for market players. Some of the strategies covered in this segment are product launches, partnerships, collaborations, business expansions, and investments. The companies' preferred strategy has been product launches, partnerships, and collaborations to strengthen their positions in the global landfill gas capture and utilization industry.

Competitive Strategy: The key players in the landfill gas capture and utilization market analyzed and profiled in the study include landfill gas capture and utilization manufacturers. Moreover, a competitive landscape of the players operating in the landfill gas capture and utilization 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 launches, synergies, and mergers and acquisitions 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 and analyzing company coverage, product portfolio, and regional presence.

Some of the prominent names in this market are:

Ameresco

Walker Energy

Enerflex Ltd.

BP p.l.c.

ENBRIDGE INC.

CenterPoint Energy

NextEra Energy, Inc.

AB HOLDING SPA

Veolia

EDL

Infinis

Biffa

Suez

CHENGTOU HOLDING CO., LTD.

Landfill Systems Ltd.

Other related companies in the ecosystem are:

Covanta Holding Corporation

Vectren Corporation

Kohler Co., Inc.

Pennon Group Plc

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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