

Global Liquefied Petroleum Gas (LPG) Market Size Study & Forecast, By Source (Refinery, Associated Gas, Non - Associated Gas), By Application (Residential/Commercial, Chemical, Industrial, Autogas, Refinery, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Liquefied Petroleum Gas (LPG) Market is valued at approximately USD 117.3 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 3.7% over the forecast period 2023-2030. Liquefied Petroleum Gas (LPG), also referred to as propane, is a flammable hydrocarbon gas widely utilized as a clean and environmentally friendly fuel due to its non-toxic and sulfur-free properties. LPG, which mainly contains propane (C₃H₈) and butane (C₄H₁₀) along with trace quantities of other hydrocarbons, is valued for its storability which enhances its portability. This characteristic makes it a versatile energy option for businesses operating in regions that lack access to piped gas. LPG is a preferred energy option due to its lower sulfur and carbon emissions, making it environmentally friendly. It is widely used in process industries for steam generation and household cooking, owing to its high flash point and minimal greenhouse gas emissions compared to other fuels. LPG is separated during oil refining and stored in cylinders under moderate pressure as it is obtained from the refining of natural gas or crude oil extracted from fossil fuels. Its versatility and environmental benefits drive its extensive use across different sectors. Factors such as the growing automotive industry the rising demand for energy-efficient fuel, and the widespread adoption of LPG by domestic consumers are fueling market growth across the globe. LPG plays a crucial role as a feedstock for petrochemicals, particularly in ethylene production via hydrocarbon cracking and syngas production through steam conversion. This aligns with consumers' shift towards low-cost LPG from more expensive

conventional fuels like petrol and diesel, further boosting market expansion. Additionally, the market is positively influenced by the increased utilization of LPG by industrial and commercial sectors.

In addition, the rising government policies and initiatives are acting as a catalyzing factor for LPG market growth across the globe. For instance, in March 2021, Abu Dhabi National Oil Company (ADNOC) and Indonesian national oil company Pertamina finalized a substantial four-year contract valued at approximately USD 2 billion. This agreement, forged during the Indonesia-Emirates "Amazing Week 2021," encompasses the supply of liquefied petroleum gas (LPG) and sulfur, with an annual contract value of about USD 500 million, subject to adjustments based on global market price fluctuations for these commodities. Also, in February 2022, Indian Oil Corp. (IOC) unveiled its strategic initiative to build three new plants in Northeast India. These plants are designed to significantly boost IOC's LPG bottling capacity, aiming for an increase of nearly 53% to reach 8 crore cylinders annually by 2030, in response to the rising demand in the region. The planned investment for this expansion project is expected to fall within the range of USD 43-46 million. Along with this, the adoption of LP gas is gaining traction globally across various sectors as the world intensifies efforts to reduce greenhouse gas emissions and promote sustainable energy practices. Governments are playing an essential role by implementing supportive initiatives and providing subsidies to promote the use of LP gas. For instance, in India the government's "PAHAL" scheme efficiently channels subsidies directly into consumers' bank accounts, benefiting those entitled to subsidies. Complementing this scheme is the "give it up" campaign, urging consumers who can afford market-priced LPG to voluntarily forgo subsidized products. This concerted effort is making LP gas an increasingly appealing alternative fuel across diverse applications, contributing significantly to the market growth during the estimated period. Moreover, the increasing emphasis on the utilization of BioLPG, as well as the growing focus on the adoption of LPG in transportation as an alternative fuel present various lucrative opportunities over the forecast years. However, the increasing competition from renewable energy sources and the high safety concerns are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Liquefied Petroleum Gas (LPG) Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. Asia Pacific dominated the market in 2022 owing to the rapidly growing population, high availability of resources, escalating energy needs, supportive government policies & subsidies, along the widespread use as a primary fuel for household cooking and water heating. Also, the chemical sector in the region has experienced substantial growth,

utilizing LP gas as a key feedstock for manufacturing various chemicals and plastics. Many countries are actively participating in summit meetings like COP21 to reduce carbon emissions globally. For instance, India is spearheading initiatives to promote alternative cooking fuels. Furthermore, the autogas market (LP gas used as a transport fuel) has rapidly developed in the Asia Pacific, supported by governments' strong and enduring policies promoting LP gas as a sustainable transport fuel. This governmental commitment is a key driver of the growing liquefied petroleum gas market in the region. Whereas, Europe is expected to grow at the highest CAGR over the forecast years. The region witnesses an increasing trend in using autogas for transportation, supported by effective incentive policies that make autogas more competitive against traditional fuels like gasoline and diesel, providing a strong financial motive for consumers to switch to Autogas significantly propelling the market demand across the region.

Major market players included in this report are:

Repsol S.A.

China Gas Holdings Ltd.

Saudi Arabian Oil Co.

FLAGA GmbH

Bharat Petroleum Corporation Limited

JGC HOLDINGS CORPORATION

Chevron Corporation

Reliance Industries Limited

Exxon Mobil Corporation

PetroChina Company Limited

Recent Developments in the Market:

In June 2021, Astomos Energy Corporation and Shell International Eastern Trading Company reached an agreement for the purchase of a carbon-neutral

liquefied petroleum gas cargo destined for Japan. This cargo is a VLGC-size LPG shipment. It has achieved carbon neutrality through the offsetting of CO₂ lifecycle emissions using verified nature-based carbon credits. Shell's global portfolio of nature-based projects will provide the credits necessary to offset emissions across the entire value chain, including production, transportation, and consumption stages. These projects focus on land protection, transformation, and restoration, allowing nature to absorb CO₂ emissions and contribute oxygen to the atmosphere.

Global Liquefied Petroleum Gas (LPG) Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Source, Application, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along

with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Source:

Refinery

Associated Gas

Non - Associated Gas

By Application:

Residential/Commercial

Chemical

Industrial

Autogas

Refinery

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

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Rest of Middle East & Africa

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