

Compressed Natural Gas (CNG) Market Analysis By Source (Associated Gas, Non-Associated Gas, Unconventional Methods), Applications (Light Duty Vehicles, Medium/Heavy Duty Buses, Medium/Heavy Duty Trucks) And Segment Forecasts To 2020

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Abstracts

Global compressed natural gas (CNG) market is anticipated to reach USD 129.77 billion by 2020. Growth of global natural gas vehicles (NGVs) industry coupled with increased automobile fuel efficiency attributed by CNG is anticipated to remain a key driving factor for the global market. Government subsidiaries in form of financial incentives particularly in Asia Pacific and Latin America is also expected to have a positive impact on the market growth. Positive outlook on exploration of unconventional resources including shale gas particularly in U.S. and China is expected to provide growth opportunities for market participants. High initial investment for CNG automobile storage tanks is expected to remain a key challenge for market participants over the forecast period. Increasing R&D expenditure by automobile manufactures on developing dual fuel engines is expected to remain a critical success factor over the next six years.

Non-associated gas emerged as leading source for CNG and accounted for 89.9% of total market volume in 2013. Increasing drilling activities particularly in Middle East is expected to ensure continuous supply of non-associated gases for CNG over the forecast period. Unconventional methods are expected to be the most lucrative source segment growing at an estimated CAGR of 28% from 2014 to 2020.

Further key findings from the study suggest:

Global CNG demand was 61,668 MCM in 2013 and is expected to reach 108,957.9 MCM by 2020, growing at a CAGR of 8.5% from 2014 to 2020.

Light duty vehicles (LDV) were the largest CNG consuming segment and accounted for 48.3% of total market volume in 2013. Growth of passenger cars particularly in emerging markets of BRICS is expected to drive this segment. LDV is also expected to witness highest growth rate over the forecast period. The segment is expected to grow at an estimated CAGR of 9.1% from 2014 to 2020.

Asia Pacific was the leading regional CNG market and is expected to continue its dominance over the next six years in the global market. The region accounted for 46.6% of total market volume in 2013. Positive outlook on automotive industry coupled with government support to promote the use of alternative transportation fuel particularly in China and India is expected to drive the regional CNG market. Central & South America is expected to be the fastest growing regional market for CNG at an estimated CAGR of 17% from 2014 to 2020.

Highly fragmented CNG industry participants compete on the basis of price differentiation across various regions. Major industry participants operating in the global CNG market include National Iranian Gas Comp, Indraprastha Gas Ltd (IGL), China Natural Gas Inc and Mahanagar gas Ltd (MNGL).

For the purpose of this study, Grand View Research has segmented the CNG market on the basis of source, application and region:

Global Compressed Natural Gas (CNG) Source Outlook (Volume, MCM; Revenue, USD Billion, 2012 – 2020)

Non-Associated Gas

Associated Gas

Unconventional Methods

Global Compressed Natural Gas (CNG) Application Outlook (Volume, MCM; Revenue, USD Billion, 2012 – 2020)

Light Duty Vehicles

Medium/Heavy Duty Buses

Medium/Heavy Duty Trucks

Others

Global Compressed Natural Gas (CNG) Regional Outlook (Volume, MCM; Revenue, USD Billion, 2012 – 2020)

North America

Europe

Asia Pacific

Middle East & Africa

Central & South America

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