

Bioenergy Market Report by Product Type (Solid Biomass, Liquid Biofuel, Biogas, and Others), Feedstock (Agricultural Waste, Wood Waste, Solid Waste, and Others), Application (Power Generation, Heat Generation, Transportation, and Others), and Region 2024-2032

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Abstracts

The global bioenergy market size reached 155.6 GW in 2023. Looking forward, IMARC Group expects the market to reach 289.2 GW by 2032, exhibiting a growth rate (CAGR) of 7% during 2024-2032. The rapid urbanization, the increasing energy needs worldwide, the stricter environmental regulations, the shift from fossil fuels to renewable sources, and the rising popularity of eco-friendly energy options are some of the factors propelling the market.

Bioenergy is a beacon of hope for our planet's sustainable future. Harnessing the power of nature, it utilizes organic materials like plants, agricultural residues, and waste to generate clean, renewable energy. This eco-friendly approach reduces greenhouse gas emissions and curbs our dependence on fossil fuels. One of its most significant advantages is its versatility. It can produce electricity, heat, and even biofuels, offering various applications. Biomass power plants generate electricity efficiently, while biogas from organic waste can provide clean cooking fuel for communities worldwide. It also fuels economic growth by creating farming, forestry, and technology jobs. It promotes rural development and empowers local communities to become self-sufficient in energy production. It is a sustainable solution to the global energy crisis. With responsible management of biomass resources and continual technology innovation, bioenergy can play a pivotal role in achieving a greener, more sustainable world.

The global market is majorly driven by the government's mandates and global goals for increasing renewable energy use. In line with this, the rising need to reduce greenhouse gas emissions accelerates the adoption of low-carbon bioenergy sources. Furthermore, it contributes to energy independence by diversifying energy sources, significantly contributing to the market. Apart from this, the growing need for rural development is positively influencing the market. Moreover, the ongoing innovation in bioenergy technologies offers numerous market opportunities. Abundant biomass resources, like crop residues and forestry waste, fuel market growth. Besides, the subsidies, tax credits, and grants encourage investment in bioenergy projects. Growing environmental consciousness motivates individuals and businesses to support bioenergy, creating a positive outlook for the market. Additionally, the heavy investments in R&D lead to breakthroughs in bioenergy production and utilization, bolstering the market.

Bioenergy Market Trends/Drivers:

Rising prevalence of global warming

The rising prevalence of global warming is fueling the market growth. As the Earth's temperature continues to rise due to greenhouse gas emissions, there is an urgent need to mitigate climate change. Bioenergy is emerging as a key player in this battle. Its sources, like biomass and biofuels, offer a carbon-neutral or even carbon-negative alternative to fossil fuels. When plants grow, they absorb carbon dioxide from the atmosphere. When these plants are converted into bioenergy, they release only the same amount of CO₂ back into the atmosphere, creating a closed carbon cycle that doesn't contribute to the net increase in greenhouse gases. This significantly reduces emissions and mitigates global warming. Furthermore, bioenergy technologies promote sustainable land use and reforestation, contributing to carbon sequestration and climate resilience. Governments and businesses increasingly recognize bioenergy's role in combatting global warming, thus incentivizing its development and deployment. The pressing issue of global warming is pushing the bioenergy market to expand rapidly as a critical component of the transition to a more sustainable and climate-resilient energy landscape.

Increasing environmental consciousness among the masses

The increasing environmental consciousness among the masses is creating a positive outlook for the market. As more individuals become aware of the pressing need to address environmental challenges like climate change, pollution, and resource depletion, they seek sustainable and eco-friendly energy solutions. Bioenergy aligns

perfectly with these eco-conscious values. It is a renewable energy source that utilizes organic materials and waste products to generate power, reducing the reliance on fossil fuels and lowering carbon emissions. Individuals and communities actively support bioenergy projects because they view them as a tangible way to impact the environment positively. Moreover, consumer preferences are influencing businesses and policymakers. Companies are adopting cleaner and greener energy sources to meet the demands of environmentally aware consumers, while governments are implementing policies and incentives to promote bioenergy adoption. This growing environmental consciousness fosters public support for bioenergy and drives investment in research and development, making bioenergy technologies more efficient and cost-effective. Ultimately, the bioenergy market benefits from this widespread awareness and commitment to a more sustainable future.

Growing demand for biomass-based electricity generation

The growing demand for biomass-based electricity generation is bolstering the market. Several countries and regions have set ambitious targets to increase the share of renewable energy in their electricity mix. Biomass-based electricity generation plays a crucial role in meeting these goals. There is a global push to reduce carbon emissions to combat climate change. Biomass electricity is considered carbon-neutral because the carbon dioxide released during combustion is offset by the carbon dioxide absorbed by the plants during their growth, making it an attractive option for reducing emissions. Biomass is a locally available resource, reducing dependence on imported fossil fuels and enhancing energy security. Biomass electricity generation can utilize agricultural residues, forestry waste, and organic waste materials, effectively converting what would otherwise be considered waste into valuable energy. Furthermore, biomass cultivation and power generation can stimulate economic growth in rural areas by creating jobs and income opportunities in the farming and forestry sectors. Biomass combustion, gasification, and co-firing technologies have improved the efficiency and cost-effectiveness of biomass-based electricity generation.

Bioenergy Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global bioenergy market report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product type, feedstock, and application.

Breakup by Product Type:

Solid Biomass

Liquid Biofuel
Biogas
Others

Liquid biofuel dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes solid biomass, liquid biofuel, biogas, and others. According to the report, liquid biofuel represented the largest segment.

Liquid biofuels, primarily biodiesel, and bioethanol, are key contributors to the transportation sector's decarbonization efforts. They offer a cleaner alternative to conventional fossil fuels, reducing greenhouse gas emissions and dependence on oil imports. The adoption of biofuels is driven by environmental concerns, government mandates, and the automotive industry's pursuit of cleaner mobility solutions.

Furthermore, solid biomass, encompassing wood, agricultural residues, and energy crops, is a versatile renewable energy source. It is used for heat and electricity generation, making it a valuable solution for residential, industrial, and power generation applications. Its sustainability, reliability, and adaptability contribute significantly to its market growth, especially in regions with abundant biomass resources.

Moreover, biogas, derived from organic waste materials through anaerobic digestion, serves multiple purposes. It can be used for electricity, heat generation, and as a clean alternative to natural gas for various industrial processes and transportation. The growing focus on waste-to-energy solutions and sustainable waste management practices fuels the demand for biogas, promoting market growth.

Breakup by Feedstock:

Agricultural Waste
Wood Waste
Solid Waste
Others

Solid waste dominates the market

The report has provided a detailed breakup and analysis of the market based on the feedstock. This includes agricultural waste, wood waste, solid waste, and others.

According to the report, solid waste represented the largest segment.

Solid waste, encompassing municipal solid waste and industrial waste, addresses two critical issues simultaneously: waste management and energy production. By diverting solid waste from landfills and incineration, it reduces environmental pollution and harnesses the energy potential within waste materials. This segment is essential for urban areas grappling with waste disposal challenges and striving for cleaner, more sustainable waste-to-energy solutions.

Agricultural waste, such as crop residues and manure, on the other hand, presents a valuable source for bioenergy production. Its utilization reduces waste disposal issues and offers farmers an additional revenue stream while contributing to the renewable energy sector. This feedstock segment is particularly crucial in regions with extensive agricultural activity.

Furthermore, wood waste, including forestry residues, sawdust, and wood chips, has been a traditional source of bioenergy. It is highly efficient in generating heat and electricity and is abundant in forested regions. Its sustainable and carbon-neutral attributes make it a popular choice for bioenergy projects, supporting market growth in the forestry sector.

Breakup by Application:

- Power Generation
- Heat Generation
- Transportation
- Others

Transportation dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes power generation, heat generation, transportation, and others. According to the report, transportation represented the largest segment.

Liquid biofuels, such as biodiesel and bioethanol, are integral to the transportation sector's efforts to reduce greenhouse gas emissions and dependence on fossil fuels. Biofuels can be blended with conventional fuels or used in dedicated vehicles, providing a cleaner alternative for cars, trucks, and aviation. The growth of the bioenergy market in transportation aligns with the global push for greener mobility solutions and

sustainable transportation.

Bioenergy plays a crucial role in electricity production. Biomass power plants, utilizing solid biomass or biogas, generate clean and renewable electricity. They contribute to grid stability and can provide baseload or dispatchable power, making bioenergy a reliable source of electricity. With an increasing focus on renewable energy sources, bioenergy's role in power generation is pivotal in reducing carbon emissions and promoting sustainable energy.

Furthermore, it is widely used for heat generation in residential, industrial, and commercial applications. Biomass heating systems, such as pellet stoves and biomass boilers, utilize solid biomass for space heating and hot water production. This sector reduces the carbon footprint and supports rural development by creating jobs in biomass production and processing.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Europe exhibits a clear dominance, accounting for the largest market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Europe accounted for the largest market share.

Europe is experiencing robust growth in the bioenergy sector. It is rich in biomass resources, including agricultural residues, forestry waste, and dedicated energy crops. This abundance provides a strong foundation for bioenergy development. The governments across the region have set ambitious renewable energy targets, promoting the adoption of bioenergy as a clean and sustainable energy source. Government incentives, subsidies, and federal and state/provincial regulations encourage investment in bioenergy projects, stimulating market growth. Bioenergy helps reduce dependence on fossil fuel imports, enhancing energy security in the region.

On the contrary, ongoing research and development efforts in North America lead to technological innovations, improving the efficiency and cost-effectiveness of bioenergy production. Growing environmental awareness and concerns about climate change drive demand for cleaner energy alternatives, including bioenergy. The bioenergy sector creates agriculture, forestry, and technology jobs, contributing to economic growth, especially in rural areas. North American nations prioritize sustainable land management and waste-to-energy solutions, aligning with bioenergy's core principles.

Competitive Landscape:

Top companies are strengthening the market through strategic initiatives and unwavering commitment to sustainability. These industry leaders are at the forefront of progress in several key areas. They channel substantial investments into research and development, propelling innovations that enhance bioenergy technologies' efficiency, cost-effectiveness, and environmental impact. These companies also drive market expansion by scaling up their production capacities to meet the surging demand for biofuels, biomass power, and biogas. Furthermore, they prioritize sustainable supply chains, ensuring responsible biomass sourcing and minimizing ecological footprints. By actively collaborating with governments, research institutions, and industry peers, they influence policies, share knowledge, and foster innovation. Several top bioenergy firms

are expanding their global footprint, introducing bioenergy solutions to new markets and regions. Through educational initiatives and a dedication to carbon reduction, these companies bolster their positions and champion the broader adoption of sustainable bioenergy solutions worldwide.

The report has provided a comprehensive analysis of the competitive landscape in the bioenergy market. Detailed profiles of all major companies have also been provided.

Archer-Daniels-Midland Company
Babcock & Wilcox Enterprises Inc.
Bunge limited
EnviTec Biogas AG
Fortum Oyj
Hitachi Zosen Corporation
Mitsubishi Heavy Industries Ltd.
MVV Energie AG
Ørsted A/S
Pacific BioEnergy
POET LLC

Recent Developments:

In May 2023, Archer-Daniels-Midland Company signed a strategic development agreement with Air Protein to collaborate on research and development to advance new and novel proteins for nutrition further.

In August 2023, Babcock & Wilcox announced an agreement involving General Hydrogen Corp., a CGI Gases subsidiary. Under the terms of the agreement, General Hydrogen Corp. will procure net-negative carbon intensity hydrogen from a biomass-driven facility employing the innovative BrightLoop technology, currently in development by B&W in Louisiana.

In July 2023, Bunge (NYSE: BG) and Chevron's Renewable Energy Group Inc., a subsidiary of Chevron Corporation (NYSE: CVX), jointly acquired Chacraservicios S.r.l., a company based in Argentina, from the Italian-based Adamant Group. This strategic investment in innovative seed sources introduces a new oil supply into the global supply chains of Bunge and Chevron.

Key Questions Answered in This Report

1. What was the size of the global bioenergy market in 2023?
2. What is the expected growth rate of the global bioenergy market during 2024-2032?

3. What are the key factors driving the global bioenergy market?
4. What has been the impact of COVID-19 on the global bioenergy market?
5. What is the breakup of the global bioenergy market based on the product type?
6. What is the breakup of the global bioenergy market based on the feedstock?
7. What is the breakup of the global bioenergy market based on the application?
8. What are the key regions in the global bioenergy market?
9. Who are the key players/companies in the global bioenergy market?

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