

Liquefied Petroleum Gas (LPG) Market Report by Source (Refinery, Associated Gas, Non-Associated Gas), Application (Residential, Commercial, Refinery and Petrochemical, Transportation, and Others), Supply Mode (Packaged, Bulk and On-site), and Region 2024-2032

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Abstracts

The global liquefied petroleum gas (LPG) market size reached US\$ 139.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 192.4 Billion by 2032, exhibiting a growth rate (CAGR) of 3.5% during 2024-2032. The market is experiencing steady growth driven by the increasing adoption of LPG as a cleaner and versatile energy source for cooking, heating, and transportation, rising demand for LPG in the petrochemical industry for use as a feedstock, and the implementation of stringent environmental regulations promoting the use of cleaner-burning fuels.

Liquefied Petroleum Gas (LPG) Market Analysis:

Market Growth and Size: The market is witnessing stable growth, fueled by its versatility and use across various industries, including residential, commercial, and industrial sectors, making it a vital part of the global energy landscape. Its market size reflects its expanding role in the transition to cleaner energy sources.

Implementation of Stringent Environment Regulations: Stringent environmental regulations worldwide necessitate the adoption of cleaner-burning fuels, boosting the market's significance as a greener energy source and aligning with global sustainability goals.

Industry Applications: The market is experiencing high demand from numerous industries, including residential heating, transportation, agriculture, and petrochemicals, reflecting its diverse utility and adaptability to various industrial processes.

Geographical Trends: Europe leads the market, propelled by its proactive embrace of LPG in residential heating and automotive applications, setting geographical trends in its adoption and contributing to the region's energy transition.

Competitive Landscape: The market is characterized by intense competition with key players focusing on expanding their product offerings and global presence to meet the growing demand while prioritizing innovation and customer-centric strategies.

Challenges and Opportunities: While the market faces challenges, such as the price volatility, it also offers lucrative growth opportunities in emerging markets and environmentally friendly applications, fostering innovation and market growth as sustainability becomes a focal point.

Future Outlook: The future of the liquefied petroleum gas (LPG) market looks promising, driven by its versatility, increasing demand for cleaner energy sources, and potential growth in emerging markets. It is poised to play a pivotal role in global energy transition efforts.

Liquefied Petroleum Gas (LPG) Market Trends:

Rising environmental concerns and clean energy transition

Environmental concerns and clean energy transition are major drivers of the liquefied petroleum gas (LPG) market as heightened global awareness of environmental issues, particularly concerning air quality and greenhouse gas emissions, has propelled a collective push toward cleaner energy sources. This has accelerated the adoption of LPG as a cleaner-burning fuel when compared to other fossil fuels like coal and oil. Its combustion releases fewer harmful pollutants and carbon emissions, making it an attractive choice for various applications. In line with international commitments to reduce carbon footprints, governments and industries worldwide are actively seeking eco-friendly energy solutions. LPG aligns with these sustainability goals, finding applications in residential heating, cooking, and transportation. Its utilization reduces air pollutants and contributes to lower greenhouse gas emissions, which is essential for mitigating climate change. As a result, there has been a rise in the demand for LPG as an environmentally responsible energy source, underlining its crucial role in the global transition toward cleaner, more sustainable energy options.

Increasing versatile applications across industries

LPG is gaining immense traction in the energy landscape due to its versatility and extensive range of applications across various industries. In the residential sector, LPG is a popular choice for heating homes and providing an efficient source for cooking. Its clean-burning properties make it an environmentally friendly option for household

energy needs. Beyond residential use, LPG finds extensive applications in industrial processes, where it serves as a crucial fuel for applications such as metal cutting, brazing, and soldering. The industrial sector also relies on LPG for heating, drying, and as a fuel source for forklifts and other equipment. Agriculture benefits from LPG's adaptability, employing it for crop drying, pest control, and as a source of power for agricultural machinery. Additionally, LPG plays a vital role in transportation as an alternative fuel for vehicles, particularly in fleets and public transportation. This diverse array of applications has accelerated the adoption of LPG as a versatile and sought-after energy source, augmenting its demand across multiple sectors and contributing significantly to market growth.

Rapid economic growth in emerging markets

Emerging markets and their sustained economic growth play a pivotal role in driving the demand for Liquefied Petroleum Gas (LPG). As these economies expand, there is a parallel increase in energy requirements to power various sectors, from residential to industrial. This heightened energy demand is often met by LPG owing to its versatility and affordability. In many emerging regions, particularly in Asia, Africa, and Latin America, LPG has become a preferred choice for cooking and heating in households, replacing traditional and often less efficient fuels. Additionally, businesses in these areas increasingly rely on LPG for various applications, including manufacturing processes and power generation. Moreover, LPG's portable nature makes it a convenient energy source for remote and off-grid areas, where access to traditional energy infrastructure may be limited. Its accessibility and relatively low installation costs make it an ideal solution to meet the energy needs of communities and businesses in these underserved regions, thus propelling market growth.

Liquefied Petroleum Gas (LPG) Industry Segmentation:

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

Breakup by Source:

Refinery

Associated Gas

Non-Associated Gas

Non-associated gas accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the source. This includes refinery, associated gas, and non-associated gas. According to the report, non-associated gas represented the largest segment.

Non-associated gas, typically found independently of oil reservoirs, dominates the LPG market as a primary source. It is obtained from natural gas fields and processed to extract LPG. Non-associated gas offers a significant advantage as a dedicated source of LPG, often yielding higher purity and quality. Its prominence in the market is strengthened by its reliability, efficiency, and lower environmental impact, aligning with the growing demand for cleaner-burning fuels and sustainability efforts. This source ensures a consistent and robust supply of LPG to meet diverse industrial, residential, and transportation needs, making it the dominant driver of the LPG market.

Refineries are a significant source of LPG production, primarily as a byproduct of the crude oil refining process. During refining, LPG is separated from other hydrocarbons and gases through distillation and fractionation processes. Refineries play a crucial role in supplying LPG for numerous domestic, industrial, and commercial applications. They are a consistent and reliable source of LPG, ensuring a stable supply to meet the growing demand for this versatile energy source.

Associated gas, often found alongside crude oil deposits, contributes to LPG production. When oil is extracted, associated gas is released and can be captured and processed to extract LPG. This source is particularly prevalent in oil-rich regions, where associated gas is a valuable resource. It provides an additional supply of LPG, supporting the market's growth and serving as a complementary source to refineries.

Breakup by Application:

- Residential
- Commercial
- Refinery and Petrochemical
- Transportation
- Others

Residential holds the largest share in the industry

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes residential, commercial, refinery and petrochemical,

transportation, and others. According to the report, residential accounted for the largest market share.

Residential applications dominate the market as LPG is extensively used in households for cooking, heating, and as a portable energy source. Its popularity in residential areas stems from its clean-burning properties, convenience, and accessibility, making it a preferred choice for millions of households globally. The reliable supply and versatility of LPG for various household needs solidify its position as a dominant driver in the market.

Commercial establishments, including restaurants, hotels, and industrial kitchens, drive the demand for LPG. It serves as a primary energy source for cooking, heating, and hot water supply in these settings. The versatility of LPG in catering to high-demand commercial operations makes it an essential choice. Furthermore, the efficient combustion and reduced environmental impact of LPG that align with commercial establishments' sustainability goals is supporting the market growth.

The refinery and petrochemical sector plays a crucial role in the market by utilizing LPG as a feedstock and fuel source. LPG is an essential component in various refining processes and petrochemical manufacturing, particularly for producing chemicals, plastics, and as a fuel for industrial operations. The sector's consistent demand for LPG as a versatile and efficient energy source reinforces its position as a key driver in the market.

LPG is also used as an alternative fuel source in transportation, including vehicles and fleets. While its influence on the market is notable, it holds a relatively smaller share compared to residential and commercial applications. LPG-powered vehicles offer reduced emissions and cost-effective transportation solutions, contributing to its escalating demand in specific regions and sectors. While important, the transportation segment is eclipsed by the dominant demand generated by residential applications in the LPG market.

Breakup by Supply Mode:

Packaged

Bulk and On-site

The report has provided a detailed breakup and analysis of the market based on the supply mode. This includes packaged and bulk and on-site.

Packaged LPG supply mode involves distributing LPG in smaller containers, typically cylinders or tanks, for residential, commercial, and small-scale industrial use. It is a fundamental driver of the LPG market, especially in residential applications where cylinders are commonly used for cooking and heating. The packaged supply mode offers convenience, easy distribution, and accessibility, making it an ideal choice for end-users who require portable and manageable quantities of LPG. It caters to a broad customer base, ensuring a steady demand for LPG and contributing significantly to market growth.

Bulk and on-site supply of LPG involves delivering larger quantities of LPG directly to industrial, commercial, and institutional facilities, often stored in large tanks or vessels. This supply mode serves as a crucial driver in the LPG market, particularly for industries with substantial energy requirements. It ensures a consistent and uninterrupted source of LPG, making it essential for manufacturing, petrochemical, and refinery operations. Bulk and on-site supply mode is valued for its efficiency, cost-effectiveness, and reduced logistical complexities, supporting diverse industrial and commercial energy needs.

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 leads the market, accounting for the largest liquefied petroleum gas (LPG) 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, Others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, Others); Latin America (Brazil, Mexico, Others); and the Middle East and Africa. According to the report, Europe accounted for the largest market share.

Europe dominates the LPG market as a leader in its adoption and usage as countries such as Germany, France, the United Kingdom, and Italy have well-established LPG infrastructure. The heightening focus of Europe on reducing carbon emissions has accelerated LPG adoption, particularly for residential heating and automotive fuel. The region's commitment to sustainability, coupled with extensive LPG distribution networks, positions Europe as a dominant driver in the global LPG market.

North America plays a pivotal role in driving the LPG market as the United States and Canada have well-established LPG infrastructure, and LPG is widely used for residential heating, cooking, and as an automotive fuel. The region also sees significant LPG demand in industrial and agricultural sectors. North America's commitment to cleaner energy sources and the continued expansion of LPG applications in various sectors contribute to its influence in the market.

The Asia Pacific region comprises key countries like China, Japan, India, South Korea, and Australia. Rapid urbanization, population growth, and increasing disposable incomes drive LPG demand in residential and commercial sectors. Additionally, Asia Pacific's industrial and automotive applications for LPG continue to expand, aligning with the region's efforts to adopt cleaner fuels and reduce emissions.

Latin America is stimulating the growth of the LPG market as Brazil and Mexico are witnessing increasing LPG demand for residential cooking and heating, supported by government programs to expand access to LPG in rural areas. Additionally, Latin

America's industrial sector employs LPG for various processes, contributing to its significance in driving the market growth.

The Middle East, in particular, represents a significant LPG producer and exporter, supplying LPG to global markets. Local demand is also rising, with LPG being used for cooking, heating, and transportation. Africa, with its expanding population and urbanization, presents opportunities for increased LPG usage, contributing to the region's impact on the global LPG market's dynamics.

Leading Key Players in the Liquefied Petroleum Gas (LPG) Industry:

The key players in the market are actively engaging in various strategies to enhance their market presence and adapt to evolving industry dynamics. These strategies include expanding their LPG production and distribution networks, investing in research and development (R&D) activities to improve LPG-related technologies and applications, and entering strategic partnerships and acquisitions to strengthen their market position. Additionally, many key players are focusing on sustainability by promoting the use of LPG as a cleaner and greener energy source, aligning with global efforts to reduce emissions and combat climate change. They are also exploring new markets, particularly in emerging economies, to tap into growing LPG demand. Overall, these leading industry leaders are committed to ensuring a stable supply of LPG while embracing innovation and sustainability to meet the changing needs of customers and the market.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Bharat Petroleum Corporation Limited
BP P.L.C.
Chevron Corporation
China Gas Holdings Ltd.
Exxon Mobil Corporation
Origin Energy Limited
Petroleum Nasional Berhad
Phillips 66 Company
Repsol S.A.
Royal Dutch Shell PLC
Valero Energy Corporation

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:

March 16, 2023: Exxon Mobil Corporation announced the successful completion of its Beaumont refinery expansion project, which will add 250,000 barrels per day of capacity to one of the largest refining and petrochemical complexes on the United States Gulf Coast. This expansion complements Exxon's growing crude production in the Permian Basin and represents the largest refinery expansion in over a decade.

May 13, 2020: Royal Dutch Shell PLC. invested in a new Nigeria LNG processing unit. Once operational, the new unit would add approximately 8 million tons per annum of capacity to the Bonny Island facility. The existing capacity ranges from 22 million to 30 million tons per annum. This joint venture primarily involves the Nigerian National Petroleum Corporation (NNPC) with a 49% stake, Royal Dutch Shell plc at 25.6%, Total at 15%, and ENI at 10.4%.

May 4, 2020: Origin Energy Limited acquired a 20% stake in the O.K.-based Octopus Energy, an energy technology group. This strategic acquisition includes a valuable license for Origin to deploy Octopus Energy's innovative technology platform, Kraken, within the Australian market.

Key Questions Answered in This Report

1. What was the size of the global liquefied petroleum gas (LPG) market in 2023?
2. What is the expected growth rate of the global liquefied petroleum gas (LPG) market during 2024-2032?
3. What are the key factors driving the global liquefied petroleum gas (LPG) market?
4. What has been the impact of COVID-19 on the global liquefied petroleum gas (LPG) market?
5. What is the breakup of the global liquefied petroleum gas (LPG) market based on the source?
6. What is the breakup of the global liquefied petroleum gas (LPG) market based on the application?
7. What are the key regions in the global liquefied petroleum gas (LPG) market?
8. Who are the key players/companies in the global liquefied petroleum gas (LPG) market?

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