

Global Gas Utilities Industry Guide - Market Summary, Competitive Analysis and Forecast to 2025

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Abstracts

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SUMMARY

Global Gas Utilities industry profile provides top-line qualitative and quantitative summary information including: market share, industry size (value and volume 2016-20, and forecast to 2025). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the industry.

KEY HIGHLIGHTS

The gas utilities market covers all natural gas consumption, net of distribution or transmission losses, by end-users in the following categories: industrial (including use as a feedstock and autogeneration), commercial and public-sector organizations, residential consumers, electric power generation (including combined heat and power but excluding autogeneration and heat plant), and other (including transport, agriculture, centralized heat plant, and other usage). Values are calculated from segment volumes and the average annual price of gas charged to end-users in each segment net of any applicable taxes.

In some countries, synthetic gas (also called syngas, coal gas, city gas, etc.) or biogas (generated from waste materials) may be used in a similar manner to natural gas and has therefore been included in the market volume. To take into account the different energy content of such gases, all calculations were carried out in energy units, and then converted to bcf using the conversion factor for

natural gas.

Market shares were calculated as the total volume of gas sold to external end-users in all segments, divided by the total market volume. To avoid the risk of double-counting, gas volumes that were distributed to end-users on behalf of another retailer under third-party network access agreements are not included. Wholesale, trading, and storage volumes are excluded (except for Russia where both wholesale and retail volumes are included). For companies which operate in both gas and power sectors, any self-supply to their own gas-fired generation plant is excluded.

All market data and forecasts are represented in nominal terms (i.e. without adjustment for inflation) and all currency conversions used in the creation of this report have been calculated using constant 2020 annual average exchange rates.

The length of the pandemic and restrictions introduced by various countries are still difficult to predict, though many governments had introduced the national lockdowns and temporarily banned sales of products that are deemed 'non-essential'. As the length of the pandemic and its impact on this market is not certain, the data used in this report has been modelled on the assumption of a crisis scenario and has taken into consideration forecast impacts on national economics.

The global gas utilities industry had total revenues of \$2,940.3bn in 2020, representing a compound annual growth rate (CAGR) of 0.4% between 2016 and 2020.

Industry consumption volume increased with a CAGR of 2.1% between 2016 and 2020, to reach a total of 111,657.3 billion cubic feet in 2020.

The Industrial segment was the industry's most valuable in 2020, with total revenues of \$1,066.2bn, equivalent to 36.3% of the industry's overall value.

SCOPE

Save time carrying out entry-level research by identifying the size, growth, major segments, and leading players in the global gas utilities industry

Use the Five Forces analysis to determine the competitive intensity and therefore attractiveness of the global gas utilities industry

Leading company profiles reveal details of key gas utilities industry players' global operations and financial performance

Add weight to presentations and pitches by understanding the future growth prospects of the global gas utilities industry with five year forecasts by both value and volume

REASONS TO BUY

What was the size of the global gas utilities industry by value in 2020?

What will be the size of the global gas utilities industry in 2025?

What factors are affecting the strength of competition in the global gas utilities industry?

How has the industry performed over the last five years?

Who are the top competitors in the global gas utilities industry?

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