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E-fuels Market by Renewable Source (Solar, Winds), Fuel Type (E-Methane, E-Kerosene, E-methanol, E-Ammonia, E-Diesel E-Gasoline), State (Gas, Liquid), End Use Application (Transportation, Chemicals, Power Generation) & Region - Forecast to 2030

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Abstracts

The global e-fuels market is estimated to grow from USD 6.2 Billion in 2023 to USD 49.4 Billion by 2030; it is expected to record a CAGR of 34.5% during the forecast period. The growth is attributed as the world moves towards a more sustainable future, e-fuels offer a critical answer for decreasing the carbon footprint of the transportation industry and other energy-intensive businesses. The market drivers for e-fuels are broad and diverse. For starters, rising demand for cleaner fuels is a big driver, as governments throughout the world impose increasingly stringent restrictions to reduce carbon emissions. Furthermore, the increased use of electric vehicles, as well as the necessity for backup energy sources to supplement renewable energy networks, is driving the expansion of the e-fuel industry.

“E-Ammonia: The largest segment of the e-fuels market, by fuel type “

Based on fuel type, the e-fuels market has been split into six types: e-methane, e-kerosene, e-methanol, e-ammonia, e-diesel and e-gasoline. The e-ammonia fuel type is expected to be the largest fuel type during the forecast period. E-ammonia can be used in a variety of industries, including transportation, agriculture (as a green fertilizer), and energy storage, making it a versatile and appealing choice. Green hydrogen may be used to make e-ammonia, which is consistent with the global shift towards cleaner energy sources. E-ammonia can be created using renewable energy sources, lowering its carbon footprint and harmonizing with environmental aims.

"Chemicals segment is expected to be the fastest segment during the forecast period based on end use application."

By end use application, the e-fuels market has been segmented into transportation, chemicals, power generation, and others. The chemicals segment is expected to have the fastest market share during the forecast period. Chemical e-fuels provide a sustainable source of raw materials for the chemical industry, aligning with increasing demand for environmentally responsible production processes.

"By state, the liquid segment is expected to be the largest segment during the forecast period."

Based on state, the e-fuels market is segmented into gas and liquid segments. The liquid segment is expected to be the largest segment of the e-fuels market during the forecast period. Due to its versatility, compatibility with existing infrastructure, and wide range of applications, the liquid section of the e-fuel business is the largest shareholder. Liquid e-fuels, such as synthetic hydrocarbons or ammonia, can replace traditional fossil fuels in transportation (cars, trucks, aviation, and shipping), heating, and industrial processes without requiring large infrastructural improvements.

"Asia Pacific is expected to be the second-largest region in the e-fuels market."

Asia Pacific is expected to be the second-largest region in the e-fuels market during the forecast period. The region has been segmented, by country, into China, Australia, India and Rest of Asia Pacific. The market in Rest of Asia Pacific is primarily studied for Indonesia, Japan, Malaysia, Singapore, and Thailand. The Asia-Pacific region's demand for e-fuels is increasing due to a number of factors. As this region undergoes tremendous economic growth and population increases, energy consumption is increasing, making sustainable and carbon-neutral energy sources such as e-fuels more appealing. Asia-Pacific is also dealing with significant environmental issues such as air pollution and climate change, which are forcing a transition towards cleaner energy sources. Furthermore, many nations in the region are introducing legal programmes and incentives to reduce carbon emissions, which is encouraging the use of e-fuels. Increased R&D investments, as well as field collaborations, are fostering innovation and driving acknowledgment of e-fuels as a critical solution for energy security, environmental sustainability, and emission reduction throughout the area.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information and assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Level- 25%, and Others- 45%

By Region: North America- 30%, Europe- 35%, Asia Pacific- 25%, RoW- 10%,

Note: Others include sales managers, engineers, and regional managers.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The e-fuels market is dominated by a few major players that have a wide regional presence. The leading players in the e-fuels market are Saudi Arabian Oil Co. (Saudi Arabia), Audi AG (Germany), Siemens Energy (Germany), Sunfire GmbH (Germany), and Norsk E-fuel (Norway). The major strategy adopted by the players includes contracts & agreements, partnerships, mergers and acquisitions, and investments & expansions.

Research Coverage:

The report defines, describes, and forecasts the global e-fuels market by renewable source, fuel type, state, end use application and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the e-fuels market.

Key Benefits of Buying the Report

- Post-COVID-19 recovery and the global energy crisis have significantly boosted clean energy investments, outpacing fossil fuel investments (24% in 2023 vs. 15% in 2021, according to the IEA World Energy Investment 2023 report). The Ukraine conflict's impact on fossil fuel markets has further accelerated investments in cleaner energy sources such as LNG and hydrogen.

Consequently, the clean energy transition is reshaping the energy landscape and driving demand for e-fuels.

Product Development/ Innovation: The e-fuels market is witnessing significant product development and innovation, driven by the growing demand for e-fuels in the transportation, aviation, chemicals and power generation industries. Companies are investing in developing sustainable e-fuels.

Market Development: Liquid Wind expanded in the Northern Sweden with its 3rd e-methanol production facility. The production is scheduled to start in 2026.

Market Diversification: Saudi Arabian Oil Co. and Stellantis have collaborated to check the compatibility of e-fuels with the European engine facilities. The companies have been working together using surrogate eFuels for the testing, according to existing fuel standards, as part of their pursuit of lower-carbon energy solutions.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, like include Saudi Arabian Oil Co. (Saudi Arabia), Audi AG (Germany), Siemens Energy (Germany), Sunfire GmbH (Germany), Norsk E-Fuel (Norway) among others in the e-fuels market.

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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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