

# **LNG Station Market by Solution (EPC, Components), Station Type (Fixed LNG, Mobile LNG, Bunkering LNG), Application (Heavy-duty Vehicles, Light-duty Vehicles, Marine), Capacity (Small Scale, Medium Scale, Large Scale), and Region - Global Forecast to 2030**

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## **Abstracts**

The LNG station market is estimated to reach USD 1.56 billion by 2030 from USD 1.02 billion in 2025, at a CAGR of 9.0% during the forecast period. Rising demand for low-emission transportation fuels, especially in heavy-duty and long-haul sectors, is driving the market. Stringent environmental regulations, supportive government policies, and advancements in LNG fueling technologies are accelerating adoption. Increased investments in LNG infrastructure and growing interest in sustainable mobility solutions further strengthen the market's growth trajectory across key global regions.

“The heavy-duty vehicles segment is expected to remain the largest segment by application.”

The heavy-duty vehicles segment is expected to remain the largest application in the LNG station market due to the growing demand for cleaner and more cost-efficient fuel alternatives in freight and long-haul transportation. Heavy-duty trucks consume significant volumes of fuel, making LNG an attractive option thanks to its lower emissions and higher energy density compared to traditional diesel. Increasing regulatory pressure to reduce greenhouse gas and pollutant emissions is encouraging fleet operators to transition toward LNG-powered vehicles. Additionally, the expanding availability of LNG fueling infrastructure and government incentives further support market growth. LNG's ability to provide reliable, long-range fueling with reduced

environmental impact makes it the preferred choice for heavy-duty transport, ensuring sustained demand for LNG stations tailored to this sector during the forecast period.

“Europe is expected to be the fastest-growing region in the LNG station market.”

Europe is poised to be the fastest-growing region in the LNG station market, driven by stringent environmental regulations and strong governmental commitment to reducing carbon emissions across the transportation sector. Policies such as the European Green Deal and Fit for 55 are accelerating the transition to cleaner fuels, prompting increased adoption of LNG in both heavy-duty road transport and maritime industries. The region's focus on decarbonization is further supported by substantial public and private investments in LNG infrastructure, including the development of cross-border refueling corridors that facilitate seamless logistics and trade. Additionally, Europe's push to diversify energy sources and reduce dependency on traditional fossil fuels is bolstering LNG's role as a critical transitional fuel. Incentives and subsidies aimed at fleet operators encourage the shift to LNG-powered vehicles, while port authorities are investing in LNG bunkering facilities to comply with International Maritime Organization (IMO) regulations. Collectively, these factors position Europe as a key growth hub, driving the rapid expansion of LNG station networks across the region.

### **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, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1 - 35%, Tier 2 - 40%, and Tier 3 - 25%

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

By Region: North America - 12%, Europe - 37%, Asia Pacific - 40%, Latin America - 11%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined based on their total revenues as of 2023.

Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3:

The LNG station market is dominated by a few major players that have a wide regional presence. The leading players in the LNG station market are CNPC (China), Shell Plc (UK), Chart Industries (US), Jereh Oil & Gas Engineering Corporation (China), Westfalen (Germany), Axegaz T&T (France), Cryonorm Group (Netherlands), Cryostar

(France), Bharat Petroleum Corporation Limited (India), Indian Oil Corporation Ltd (India), GRUPO HAM (Spain), Rolande (Netherlands), and INOX India Limited (India).

### **Research Coverage:**

The report defines, describes, and forecasts the LNG station market by solution, station type, application, and capacity. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of 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 LNG station market.

### **Key Benefits of Buying the Report**

The LNG station market is driven by the global shift toward cleaner energy solutions, rising demand for low-emission transport fuels, and the need to reduce greenhouse gas emissions, particularly in heavy-duty and long-haul transportation sectors. As the transportation and logistics industries pursue decarbonization, LNG stations play a vital role by offering cost-effective and environmentally friendly refueling options. Supportive government policies, emissions regulations, and financial incentives are encouraging the adoption of LNG-powered vehicles and vessels across developed and emerging economies. Technological advancements in cryogenic storage, modular station design, and fueling efficiency are further supporting market growth. The expansion of LNG supply chains, growing public-private partnerships, and strategic investments in fueling infrastructure continue to accelerate the development of LNG stations. With a strong focus on sustainable mobility, energy diversification, and reducing dependence on diesel, LNG stations have become a key enabler in the transition toward cleaner transportation. These trends are driving steady growth in the LNG station market on a global scale.

**Product Development/Innovation:** The LNG station market is focused on advancing efficiency, safety, and scalability through innovative technologies and system designs. Companies are developing modular and skid-mounted LNG stations for faster deployment and flexibility across diverse locations. Innovations in cryogenic pump technology, automated fueling systems, and real-time monitoring enhance operational reliability and refueling speed. Integration of IoT and data analytics enables predictive maintenance and performance

optimization. Materials improvements focus on thermal insulation, durability, and corrosion resistance, extending equipment lifespan. These developments are crucial for enhancing fueling infrastructure and supporting the broader adoption of LNG in clean transportation.

**Market Development:** In February 2021, Cryostar launched Dispenser 3.0 to enhance the LNG refueling user experience through design improvements and intuitive features. Developed using feedback from global users, the dispenser offers a modern aesthetic, a multilingual touchscreen with animated refueling instructions, ergonomic button placement, and weather protection.

**Market Diversification:** Germany's Westfalen completed its second LNG filling station for trucks in Herford, following its first in Münster. Built in partnership with Cryotek Services of Cryonorm, the station features a 17-meter-high LNG tank.

**Competitive Assessment:** Assessment of rankings of some of the key players, including CNPC (China), Shell Plc (UK), Chart Industries (US), Jereh Oil & Gas Engineering Corporation (China), Westfalen (Germany), Axegaz T&T (France), Cryonorm Group (Netherlands), Cryostar (France), and INOX India Limited (India).

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