

Small-Scale LNG Market by Type (Liquefaction, Regasification), Application (Heavy-Duty Vehicles, Industrial & Power, Marine Transport), Mode of supply (Trucks, Trans-shipment & Bunkering) Region (North America, Europe, APAC, MEA) - Global Forecast to 2028

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Abstracts

The small-scale LNG market is projected to grow from USD 46.4 billion in 2023 to USD 92.8 billion by 2028, recording a CAGR of 14.9% during the forecast period. This growth can be attributed to the rising demand for small-scale LNG in sectors such as heavy-duty vehicles, marine transport, and industrial and power applications. The increased adoption of small-scale LNG in these industries is expected to drive market expansion. However, the growth of the market may face obstacles due to limited receiving terminal infrastructure in the Asia-Pacific region and the fluctuating price of small-scale LNG. These factors could impede the market's progress by affecting the availability and accessibility of small-scale LNG, hindering its widespread adoption and potential for further growth.

Liquefaction segment is likely to drive the global market during the forecast period

The small-scale LNG market has been segmented on the basis of type as liquefaction and regasification. The Regasification segment accounted for the 2nd largest larger of the market during the forecast period. The regasification segment in the small-scale LNG market refers to the process of converting liquefied natural gas (LNG) back into its gaseous state. LNG is transported and stored in a liquid form due to its significantly reduced volume compared to its gaseous state, which makes it more economical for long-distance transportation. However, before it can be used, LNG needs to be

regasified, or reconverted into natural gas, so that it can be injected into the natural gas grid or used as fuel. Natural gas is considered a cleaner and more environmentally friendly fuel compared to coal and oil. As the world focuses on reducing greenhouse gas emissions and transitioning to cleaner energy sources, the demand for natural gas is expected to rise. Regasification units play a crucial role in meeting this increasing demand by facilitating the utilization of LNG. Additionally, Governments and energy companies are investing in small-scale LNG infrastructure, including regasification terminals and facilities. These investments aim to enhance energy security, diversify fuel sources, and provide access to natural gas in regions where pipeline infrastructure is inadequate. This infrastructure development will fuel the growth of the regasification segment.

Marine Transport segment is expected to account for the 2nd largest market share during the forecast period

The maritime industry is under increasing pressure to reduce emissions and comply with stricter environmental regulations. LNG is considered a cleaner fuel compared to traditional marine fuels like heavy fuel oil and diesel. It offers significant emissions reductions in terms of sulfur oxides (SO_x), nitrogen oxides (NO_x), particulate matter, and greenhouse gases. This has led to a growing interest in LNG as a fuel for ships, particularly in emission-controlled areas such as coastal regions and ports. Additionally, LNG offers better energy efficiency compared to conventional marine fuels. LNG has a higher energy content per unit of weight, allowing ships to achieve longer voyage distances with the same fuel capacity. This becomes particularly advantageous for vessels involved in long-haul transportation, such as ferries, offshore support vessels, and even some bulk carriers.

Europe accounts for the second largest market during the forecast period

Europe is expected to account for the 2nd largest market during the forecast period due to significant developments in various end-use applications such as industrial & power, heavy-duty vehicles, and marine transport. Europe has been actively seeking energy diversification to reduce its dependence on traditional fossil fuels. Small-scale LNG offers an alternative energy source that is cleaner and more environmentally friendly compared to coal or oil. It is seen as a bridge fuel towards a low-carbon future. Additionally, Europe has been at the forefront of implementing stringent environmental regulations. Small-scale LNG is considered a cleaner fuel option as it emits significantly lower levels of pollutants and greenhouse gases compared to other fossil fuels. This aligns with the European Union's efforts to reduce carbon emissions and improve air

quality. Overall, the Europe region's small-scale LNG market is poised for growth due to the increasing emphasis on energy diversification, environmental regulations, decentralization of energy supply, and the expanding adoption of LNG in the transport sector.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the small-scale LNG marketplace.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub-segments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type - Tier 1 – 30%, Tier 2 – 50%, and Tier 3 – 20%

By Designation – C level Executives – 40%, Director level – 20%, and Others* – 40%

By Region – North America – 20%, Europe – 20%, Asia Pacific – 40%, Middle East & Africa – 5%, Latin America – 15%.

Notes: *Others include sales, marketing, and product managers.

Notes: Tier 1: >USD 5 Billion; Tier 2: USD 1 Billion– USD 5 Billion; and Tier 3:

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
 - 1.2.1 INCLUSIONS AND EXCLUSIONS
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION
 - 1.3.2 REGIONS COVERED
 - 1.3.3 YEARS CONSIDERED
- 1.4 CURRENCY CONSIDERED
- 1.5 UNITS CONSIDERED
- 1.6 LIMITATIONS
- 1.7 STAKEHOLDERS
- 1.8 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - FIGURE 1 RESEARCH DATA IN SMALL-SCALE LNG MARKET
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Key data from primary sources
 - 2.1.2.2 Breakdown of primary interviews
- 2.2 BASE NUMBER CALCULATION
 - 2.2.1 SUPPLY-SIDE APPROACH 1
 - 2.2.2 SUPPLY-SIDE APPROACH 2
- 2.3 MARKET SIZE ESTIMATION
 - 2.3.1 BOTTOM-UP APPROACH
 - 2.3.2 TOP-DOWN APPROACH
- 2.4 DATA TRIANGULATION
 - FIGURE 2 SMALL-SCALE LNG MARKET: DATA TRIANGULATION
- 2.5 RESEARCH ASSUMPTIONS
- 2.6 RECESSION IMPACT

3 EXECUTIVE SUMMARY

FIGURE 3 LIQUEFACTION TYPE TO LEAD SMALL-SCALE LNG MARKET
FIGURE 4 TRUCKS SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD
FIGURE 5 HEAVY-DUTY VEHICLE APPLICATION TO LEAD MARKET DURING FORECAST PERIOD
FIGURE 6 ASIA PACIFIC LED SMALL-SCALE LNG MARKET IN 2022

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SMALL-SCALE LNG MARKET
FIGURE 7 ASIA PACIFIC TO BE FASTEST GROWING SMALL-SCALE LNG MARKET DURING FORECAST PERIOD
4.2 SMALL-SCALE LNG MARKET, BY TYPE
FIGURE 8 LIQUEFACTION TYPE TO RECORD HIGH CAGR DURING FORECAST PERIOD
4.3 SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY
FIGURE 9 TRUCK SEGMENT TO RECORD HIGH CAGR DURING FORECAST PERIOD
4.4 SMALL-SCALE LNG MARKET, BY APPLICATION
FIGURE 10 ALL APPLICATION SEGMENTS TO SHOW SIGNIFICANT GROWTH DURING FORECAST PERIOD
4.5 SMALL-SCALE LNG MARKET: MAJOR COUNTRIES
FIGURE 11 CHINA TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD
4.6 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY TYPE & COUNTRY
FIGURE 12 LIQUEFACTION TYPE AND CHINA LED MARKET IN ASIA PACIFIC IN 2022

5 MARKET OVERVIEW

5.1 INTRODUCTION
5.2 MARKET DYNAMICS
FIGURE 13 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN SMALL-SCALE LNG MARKET
5.2.1 DRIVERS
5.2.1.1 Price competitiveness of LNG compared to other transportation fuel
TABLE 1 LIQUEFIED NATURAL GAS (LNG) AND DIESEL AVERAGE RETAIL PRICES BY REGION, 2022
5.2.1.2 Advantages of small-scale plants over large-scale plants
5.2.1.3 Environmental benefits and stringent regulations

5.2.1.4 Fiscal regime and government subsidies

5.2.1.5 Rising demand for LNG in bunkering, road transportation, and off-grid power

5.2.2 RESTRAINTS

5.2.2.1 Limited LNG receiving terminal infrastructure in Asia Pacific compared to other regions

5.2.2.2 Depletion of natural resources and volatility in prices of raw materials

FIGURE 14 SMALL-SCALE LNG MARKET: VOLATILE PRICES OF HENRY HUB NATURAL GAS (USD/MMBTU)

5.2.3 OPPORTUNITIES

5.2.3.1 Integration of new technology

5.2.4 CHALLENGES

5.2.4.1 Supply chain disruptions, limited supply, and high retrofitting costs

5.3 PORTER'S FIVE FORCES ANALYSIS

FIGURE 15 SMALL-SCALE LNG MARKET: PORTER'S FIVE FORCES ANALYSIS

5.3.1 BARGAINING POWER OF SUPPLIERS

5.3.2 THREAT OF NEW ENTRANTS

5.3.3 THREAT OF SUBSTITUTES

5.3.4 BARGAINING POWER OF BUYERS

5.3.5 INTENSITY OF COMPETITIVE RIVALRY

6 INDUSTRY TRENDS

6.1 MACROECONOMIC INDICATORS

6.1.1 INTRODUCTION

6.1.2 GDP TRENDS AND FORECAST

TABLE 2 WORLD GDP GROWTH PROJECTION, 2021–2028 (USD TRILLION)

6.2 VALUE CHAIN ANALYSIS

FIGURE 16 SMALL-SCALE LNG: VALUE CHAIN ANALYSIS

6.3 SUPPLY CHAIN ANALYSIS

FIGURE 17 SMALL-SCALE LNG MARKET: SUPPLY CHAIN

6.4 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS

FIGURE 18 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS

6.5 ECOSYSTEM MAPPING

FIGURE 19 ECOSYSTEM MAP

6.6 PATENT ANALYSIS

6.6.1 INTRODUCTION

6.6.2 METHODOLOGY

6.6.3 DOCUMENT TYPE FOR SMALL-SCALE LNG (2013–2022)

TABLE 3 TOTAL NUMBER OF PATENTS FOR SMALL-SCALE LNG

FIGURE 20 SMALL-SCALE LNG MARKET: GRANTED PATENTS AND PATENT APPLICATIONS

FIGURE 21 PUBLICATION TRENDS - LAST 10 YEARS (2013–2022)

6.6.4 INSIGHTS

FIGURE 22 JURISDICTION ANALYSIS (2013–2022)

6.6.5 TOP COMPANIES/APPLICANTS (TILL 2022)

FIGURE 23 TOP APPLICANTS OF SMALL-SCALE LNG

TABLE 4 PATENTS FOR SMALL-SCALE LNG

6.6.6 DISCLAIMER

6.7 TECHNOLOGY ANALYSIS

6.7.1 NITROGEN EXPANDER TECHNOLOGY

6.7.2 PREFABRICATED MODULAR PLANTS

6.7.3 SINGLE MIXED REFRIGERANT (SMR) TECHNOLOGY

6.7.4 MEMBRANE CONTAINMENT SYSTEMS

6.8 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 5 SMALL-SCALE LNG MARKET: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.9 KEY STAKEHOLDERS & BUYING CRITERIA

6.9.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 24 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS

TABLE 6 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF SMALL-SCALE LNG

6.9.2 BUYING CRITERIA

FIGURE 25 KEY BUYING CRITERIA OF SMALL-SCALE LNG INDUSTRY

TABLE 7 KEY BUYING CRITERIA FOR SMALL-SCALE LNG INDUSTRY

6.10 TRADE ANALYSIS

TABLE 8 IMPORTERS OF LNG, BY VALUE (USD BILLION), IN 2022 (HS = 271111)

TABLE 9 EXPORTERS OF LNG, BY VALUE (USD BILLION), IN 2022 (HS = 271111)

6.11 NATURAL GAS RESERVES

TABLE 10 TOP 15 COUNTRIES WITH LARGEST PROVEN NATURAL GAS RESERVES AND THEIR WORLD SHARE

6.12 NATURAL GAS CONSUMPTION

TABLE 11 TOP 15 COUNTRIES WITH NATURAL GAS CONSUMPTION AND THEIR WORLD SHARE

6.13 CASE STUDY ANALYSIS

TABLE 12 CHART INDUSTRIES: C50N LNG LIQUEFIER

TABLE 13 WARTSILLA: DRAGON LNG TERMINAL - BOG RELIQUEFACTION FOR LNG TERMINALS

6.14 KEY CONFERENCES

TABLE 14 SMALL-SCALE LNG MARKET: DETAILED LIST OF CONFERENCES & EVENTS, 2023–2024

6.15 PRICING ANALYSIS

6.15.1 COST ANALYSIS ON SMALL-SCALE LNG PROJECTS

7 SMALL-SCALE LNG MARKET, BY TYPE

7.1 INTRODUCTION

FIGURE 26 LIQUEFACTION TO DOMINATE SMALL-SCALE LNG MARKET DURING FORECAST PERIOD

TABLE 15 SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 16 SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

7.2 LIQUEFACTION

7.2.1 HIGH DEMAND FOR LOCAL PRODUCTION OF LNG TO DRIVE MARKET

7.3 REGASIFICATION

7.3.1 GROWING DEMAND FOR LNG IN ASIA PACIFIC TO DRIVE MARKET

8 SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY

8.1 INTRODUCTION

FIGURE 27 TRUCKS SEGMENT TO DOMINATE SMALL-SCALE LNG MARKET DURING FORECAST PERIOD

TABLE 17 SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 18 SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

8.2 TRUCKS

8.2.1 ABILITY TO TRANSPORT LNG TO OFF-GRID AREAS TO DRIVE MARKET

8.3 TRANS-SHIPMENT & BUNKERING

8.3.1 GOVERNMENT INITIATIVES TO DRIVE MARKET

8.4 OTHERS

8.4.1 CONSIDERABLE GOVERNMENT SUPPORT TO DRIVE MARKET

9 SMALL-SCALE LNG MARKET, BY APPLICATION

9.1 INTRODUCTION

FIGURE 28 HEAVY-DUTY VEHICLES TO BE LARGEST APPLICATION OF SMALL-SCALE LNG

TABLE 19 SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 20 SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)**9.2 HEAVY-DUTY VEHICLES****9.2.1 COST-SAVING BENEFITS OF LNG IN HEAVY-DUTY TRUCKS TO DRIVE MARKET****9.3 MARINE TRANSPORT****9.3.1 ENVIRONMENTAL REGULATIONS FOR EMISSION CONTROL AREAS (ECA) TO DRIVE MARKET****9.4 INDUSTRIAL & POWER****9.4.1 INCREASING DEMAND FOR NATURAL GAS IN ELECTRICITY GENERATION TO DRIVE MARKET****9.5 OTHERS****10 SMALL-SCALE LNG MARKET, BY REGION****10.1 INTRODUCTION****FIGURE 29 ASIA PACIFIC TO BE FASTEST-GROWING SMALL-SCALE LNG MARKET****TABLE 21 SMALL-SCALE LNG MARKET, BY REGION, 2021–2028 (MTPA)****TABLE 22 SMALL-SCALE LNG MARKET, BY REGION, 2021–2028 (USD MILLION)****10.2 ASIA PACIFIC****10.2.1 RECESSION IMPACT****FIGURE 30 ASIA PACIFIC: SMALL-SCALE LNG MARKET SNAPSHOT****TABLE 23 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (MTPA)****TABLE 24 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 25 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)****TABLE 26 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)****TABLE 27 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)****TABLE 28 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)****TABLE 29 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)****TABLE 30 ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)**

10.2.2 CHINA

10.2.2.1 Growth in transport industry to drive market

TABLE 31 CHINA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 32 CHINA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 33 CHINA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 34 CHINA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 35 CHINA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 36 CHINA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.2.3 JAPAN

10.2.3.1 Demand for regasification and increasing import of small-scale LNG to drive market

TABLE 37 JAPAN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 38 JAPAN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 39 JAPAN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 40 JAPAN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 41 JAPAN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 42 JAPAN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.2.4 INDIA

10.2.4.1 Growing imports of LNG and investment in power sector to drive market

TABLE 43 INDIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 44 INDIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 45 INDIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 46 INDIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 47 INDIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 48 INDIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

MILLION)

10.2.5 SOUTH KOREA

10.2.5.1 Government initiatives to shift away from coal and nuclear power as energy sources to drive market

TABLE 49 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 50 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 51 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 52 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 53 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 54 SOUTH KOREA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.2.6 AUSTRALIA

10.2.6.1 Growth in LNG production and infrastructure development to drive market

TABLE 55 AUSTRALIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 56 AUSTRALIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 57 AUSTRALIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 58 AUSTRALIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 59 AUSTRALIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 60 AUSTRALIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.2.7 TAIWAN

10.2.7.1 Construction of receiving LNG terminals to drive growth

TABLE 61 TAIWAN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 62 TAIWAN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 63 TAIWAN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 64 TAIWAN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 65 TAIWAN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028

(MTPA)

TABLE 66 TAIWAN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(USD MILLION)

10.2.8 SINGAPORE

10.2.8.1 Increasing demand from end-use applications to drive market

TABLE 67 SINGAPORE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028
(MTPA)

TABLE 68 SINGAPORE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD
MILLION)

TABLE 69 SINGAPORE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (MTPA)

TABLE 70 SINGAPORE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (USD MILLION)

TABLE 71 SINGAPORE: SMALL-SCALE LNG MARKET, BY APPLICATION,
2021–2028 (MTPA)

TABLE 72 SINGAPORE: SMALL-SCALE LNG MARKET, BY APPLICATION,
2021–2028 (USD MILLION)

10.2.9 INDONESIA

10.2.9.1 Expanding small-scale LNG infrastructure to drive market

TABLE 73 INDONESIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 74 INDONESIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD
MILLION)

TABLE 75 INDONESIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (MTPA)

TABLE 76 INDONESIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (USD MILLION)

TABLE 77 INDONESIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(MTPA)

TABLE 78 INDONESIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(USD MILLION)

10.2.10 REST OF ASIA PACIFIC

TABLE 79 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY TYPE,
2021–2028 (MTPA)

TABLE 80 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY TYPE,
2021–2028 (USD MILLION)

TABLE 81 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY MODE OF
SUPPLY, 2021–2028 (MTPA)

TABLE 82 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY MODE OF
SUPPLY, 2021–2028 (USD MILLION)

TABLE 83 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 84 REST OF ASIA PACIFIC: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3 EUROPE

10.3.1 RECESSION IMPACT

FIGURE 31 EUROPE: SMALL-SCALE LNG MARKET SNAPSHOT

TABLE 85 EUROPE: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (MTPA)

TABLE 86 EUROPE: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 87 EUROPE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 88 EUROPE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 89 EUROPE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 90 EUROPE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 91 EUROPE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 92 EUROPE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.2 GERMANY

10.3.2.1 Increasing demand for alternative fuels in transportation sector to drive market

TABLE 93 GERMANY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 94 GERMANY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 95 GERMANY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 96 GERMANY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 97 GERMANY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 98 GERMANY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.3 FRANCE

10.3.3.1 Integrating renewable energy sources into energy mix to significantly drive market

TABLE 99 FRANCE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 100 FRANCE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 101 FRANCE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 102 FRANCE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 103 FRANCE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 104 FRANCE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.4 ITALY

10.3.4.1 Growing investments in LNG infrastructure to drive market

TABLE 105 ITALY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 106 ITALY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 107 ITALY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 108 ITALY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 109 ITALY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 110 ITALY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.5 UK

10.3.5.1 Expansion of import terminals and distribution network to drive market

TABLE 111 UK: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 112 UK: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 113 UK: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 114 UK: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 115 UK: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 116 UK: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.6 RUSSIA

10.3.6.1 Large production of natural gas to drive market

TABLE 117 RUSSIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 118 RUSSIA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 119 RUSSIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 120 RUSSIA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 121 RUSSIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 122 RUSSIA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.7 SPAIN

10.3.7.1 Government initiative for sustainable transportation to drive market

TABLE 123 SPAIN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 124 SPAIN: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 125 SPAIN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 126 SPAIN: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 127 SPAIN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 128 SPAIN: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.8 PORTUGAL

10.3.8.1 Government initiatives to diversify energy mix to offer opportunities for players

TABLE 129 PORTUGAL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 130 PORTUGAL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 131 PORTUGAL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 132 PORTUGAL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 133 PORTUGAL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 134 PORTUGAL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.9 NETHERLANDS

10.3.9.1 Strategic location and well-established maritime connections to drive market
TABLE 135 NETHERLANDS: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 136 NETHERLANDS: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 137 NETHERLANDS: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 138 NETHERLANDS: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 139 NETHERLANDS: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 140 NETHERLANDS: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.10 TURKEY

10.3.10.1 Government initiative to diversify energy sources and reduce dependence on imported oil to drive market

TABLE 141 TURKEY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 142 TURKEY: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 143 TURKEY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 144 TURKEY: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 145 TURKEY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 146 TURKEY: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.3.11 REST OF EUROPE

TABLE 147 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 148 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 149 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 150 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 151 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 152 REST OF EUROPE: SMALL-SCALE LNG MARKET, BY APPLICATION,

2021–2028 (USD MILLION)

10.4 NORTH AMERICA

10.4.1 RECESSION IMPACT

FIGURE 32 NORTH AMERICA: SMALL-SCALE LNG MARKET SNAPSHOT

TABLE 153 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (MTPA)

TABLE 154 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 155 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 156 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 157 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 158 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 159 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 160 NORTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.4.2 US

10.4.2.1 Emergence of shale gas and increasing natural gas consumption to drive market

TABLE 161 US: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 162 US: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 163 US: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 164 US: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 165 US: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 166 US: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.4.3 CANADA

10.4.3.1 Growing heavy-duty transport facilities to drive market

TABLE 167 CANADA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 168 CANADA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 169 CANADA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,

2021–2028 (MTPA)

TABLE 170 CANADA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (USD MILLION)

TABLE 171 CANADA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(MTPA)

TABLE 172 CANADA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(USD MILLION)

10.4.4 MEXICO

10.4.4.1 Promotion of domestic natural gas production and infrastructure
development to drive growth

TABLE 173 MEXICO: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 174 MEXICO: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD
MILLION)

TABLE 175 MEXICO: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (MTPA)

TABLE 176 MEXICO: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY,
2021–2028 (USD MILLION)

TABLE 177 MEXICO: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(MTPA)

TABLE 178 MEXICO: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028
(USD MILLION)

10.5 MIDDLE EAST & AFRICA

TABLE 179 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY COUNTRY,
2021–2028 (MTPA)

TABLE 180 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY COUNTRY,
2021–2028 (USD MILLION)

TABLE 181 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY TYPE,
2021–2028 (MTPA)

TABLE 182 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY TYPE,
2021–2028 (USD MILLION)

TABLE 183 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF
SUPPLY, 2021–2028 (MTPA)

TABLE 184 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF
SUPPLY, 2021–2028 (USD MILLION)

TABLE 185 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY
APPLICATION, 2021–2028 (MTPA)

TABLE 186 MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY
APPLICATION, 2021–2028 (USD MILLION)

10.5.1 RECESSION IMPACT

10.5.2 QATAR

10.5.2.1 Huge exports of natural gas to drive market

TABLE 187 QATAR: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 188 QATAR: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 189 QATAR: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 190 QATAR: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 191 QATAR: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 192 QATAR: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.5.3 ISRAEL

10.5.3.1 Geographic location and energy need to drive market

TABLE 193 ISRAEL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 194 ISRAEL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 195 ISRAEL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 196 ISRAEL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 197 ISRAEL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 198 ISRAEL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.5.4 UAE

10.5.4.1 Strategic location as a major logistics and trade hub in Middle East to drive market

TABLE 199 UAE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 200 UAE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 201 UAE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 202 UAE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 203 UAE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 204 UAE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD

MILLION)

10.5.5 SOUTH AFRICA

10.5.5.1 Substantial natural gas resources to drive market

TABLE 205 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 206 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 207 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 208 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 209 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 210 SOUTH AFRICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.5.6 REST OF MIDDLE EAST & AFRICA

TABLE 211 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 212 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 213 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 214 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 215 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 216 REST OF MIDDLE EAST & AFRICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.6 SOUTH AMERICA

TABLE 217 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (MTPA)

TABLE 218 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 219 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 220 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 221 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 222 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 223 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 224 SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.6.1 RECESSION IMPACT

10.6.2 BRAZIL

10.6.2.1 Improved economy to drive market

TABLE 225 BRAZIL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 226 BRAZIL: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 227 BRAZIL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 228 BRAZIL: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 229 BRAZIL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 230 BRAZIL: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.6.3 ARGENTINA

10.6.3.1 Increased investment in LNG terminal infrastructure to drive market

TABLE 231 ARGENTINA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 232 ARGENTINA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 233 ARGENTINA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 234 ARGENTINA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 235 ARGENTINA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 236 ARGENTINA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.6.4 CHILE

10.6.4.1 Increased application in heavy-duty vehicles to drive market

TABLE 237 CHILE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 238 CHILE: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 239 CHILE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 240 CHILE: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 241 CHILE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 242 CHILE: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

10.6.5 REST OF SOUTH AMERICA

TABLE 243 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (MTPA)

TABLE 244 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 245 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (MTPA)

TABLE 246 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY MODE OF SUPPLY, 2021–2028 (USD MILLION)

TABLE 247 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (MTPA)

TABLE 248 REST OF SOUTH AMERICA: SMALL-SCALE LNG MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

TABLE 249 STRATEGIES ADOPTED BY KEY PLAYERS DURING FORECAST PERIOD

11.2 REVENUE ANALYSIS OF KEY PLAYERS

FIGURE 33 REVENUE ANALYSIS OF KEY COMPANIES IN SMALL-SCALE LNG MARKET

11.3 MARKET SHARE ANALYSIS

FIGURE 34 SHARES OF TOP COMPANIES IN SMALL-SCALE LNG MARKET

11.4 COMPANY EVALUATION QUADRANT

11.4.1 STARS

11.4.2 EMERGING LEADERS

11.4.3 PARTICIPANTS

11.4.4 PERVASIVE PLAYERS

FIGURE 35 COMPETITIVE LEADERSHIP MAPPING: SMALL-SCALE LNG MARKET, 2022

11.5 STARTUP/SME EVALUATION QUADRANT

11.5.1 PROGRESSIVE COMPANIES

11.5.2 RESPONSIVE COMPANIES

11.5.3 DYNAMIC COMPANIES

11.5.4 STARTING BLOCKS

FIGURE 36 SME MATRIX: SMALL-SCALE LNG MARKET, 2022

11.6 COMPETITIVE BENCHMARKING

TABLE 250 SMALL-SCALE LNG MARKET: KEY PLAYERS

TABLE 251 SMALL-SCALE LNG MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS, BY APPLICATION

TABLE 252 SMALL-SCALE LNG MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS, BY REGION

11.7 COMPETITIVE SCENARIO

11.7.1 DEALS

TABLE 253 DEALS, 2018–2023

11.7.2 PRODUCT/SERVICE LAUNCHES

TABLE 254 PRODUCT/SERVICE LAUNCHES, 2018–2023

12 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, MnM View Right to win, Strategic choices made, Weaknesses and competitive threats) *

12.1 KEY PLAYERS

12.1.1 LINDE PLC

TABLE 255 LINDE PLC: COMPANY OVERVIEW

FIGURE 37 LINDE PLC: COMPANY SNAPSHOT

TABLE 256 LINDE PLC: DEALS

12.1.2 WARTSILA CORPORATION

TABLE 257 WARTSILA CORPORATION: COMPANY OVERVIEW

FIGURE 38 WARTSILA CORPORATION: COMPANY SNAPSHOT

TABLE 258 WARTSILA CORPORATION: DEALS

12.1.3 HONEYWELL INTERNATIONAL INC.

TABLE 259 HONEYWELL INTERNATIONAL INC.: BUSINESS OVERVIEW

FIGURE 39 HONEYWELL INTERNATIONAL INC.: COMPANY SNAPSHOT

12.1.4 ENGIE S.A.

TABLE 260 ENGIE S.A.: COMPANY OVERVIEW

FIGURE 40 ENGIE S.A.: COMPANY SNAPSHOT

TABLE 261 ENGIE S.A.: DEALS

TABLE 262 ENGIE S.A.: PRODUCT/SERVICE LAUNCHES

12.1.5 SHELL PLC

TABLE 263 SHELL PLC.: COMPANY OVERVIEW

FIGURE 41 SHELL PLC: COMPANY SNAPSHOT

TABLE 264 SHELL PLC: DEALS

TABLE 265 SHELL PLC: OTHERS

TABLE 266 SHELL PLC: PRODUCT/SERVICE LAUNCHES

12.1.6 GASUM OY

TABLE 267 GASUM OY: COMPANY OVERVIEW

FIGURE 42 GASUM OY: COMPANY SNAPSHOT

TABLE 268 GASUM OY: DEALS

TABLE 269 GASUM OY: OTHERS

12.1.7 CHART INDUSTRIES, INC.

TABLE 270 CHART INDUSTRIES, INC.: COMPANY OVERVIEW

FIGURE 43 CHART INDUSTRIES, INC.: COMPANY SNAPSHOT

TABLE 271 CHART INDUSTRIES, INC.: DEALS

TABLE 272 CHART INDUSTRIES, INC.: OTHERS

12.1.8 AIR PRODUCTS AND CHEMICALS, INC.

TABLE 273 AIR PRODUCTS AND CHEMICALS, INC.: COMPANY OVERVIEW

FIGURE 44 AIR PRODUCTS AND CHEMICALS, INC.: COMPANY SNAPSHOT

TABLE 274 AIR PRODUCTS AND CHEMICALS, INC.: DEALS

12.1.9 EXCELERATE ENERGY, INC

TABLE 275 EXCELERATE ENERGY, INC.: COMPANY OVERVIEW

FIGURE 45 EXCELERATE ENERGY, INC.: COMPANY SNAPSHOT

TABLE 276 EXCELERATE ENERGY, INC.: DEALS

12.1.10 SOFREGAZ

TABLE 277 SOFREGAZ: COMPANY OVERVIEW

12.2 OTHER PLAYERS

12.2.1 PLUM ENERGY

TABLE 278 PLUM ENERGY: COMPANY OVERVIEW

12.2.2 STABILIS ENERGY

TABLE 279 STABILIS ENERGY: COMPANY OVERVIEW

12.2.3 NIKKISO'S CLEAN ENERGY & INDUSTRIAL GASES GROUP

TABLE 280 NIKKISO'S CLEAN ENERGY & INDUSTRIAL GASES GROUP:
COMPANY OVERVIEW

12.2.4 SNAM S.P.A.

TABLE 281 SNAM S.P.A.: COMPANY OVERVIEW

12.2.5 BAKER HUGHES CO.

TABLE 282 BAKER HUGHES CO.: COMPANY OVERVIEW

12.2.6 GASNORE

TABLE 283 GASNORE: COMPANY OVERVIEW**12.2.7 PETRONET LNG LIMITED****TABLE 284 PETRONET LNG LIMITED: COMPANY OVERVIEW****12.2.8 HANGZHOU FORTUNE GAS CRYOGENIC GROUP CO., LTD****TABLE 285 HANGZHOU FORTUNE GAS CRYOGENIC GROUP CO., LTD:
COMPANY OVERVIEW****12.2.9 BLACK & VEATCH HOLDING COMPANY****TABLE 286 BLACK & VEATCH HOLDING COMPANY: COMPANY OVERVIEW****12.2.10 PGNIG SA****TABLE 287 PGNIG SA: COMPANY OVERVIEW****12.2.11 SCALE GAS SOLUTIONS****TABLE 288 SCALE GAS SOLUTIONS: COMPANY OVERVIEW****12.2.12 PILOT LNG LLC****TABLE 289 PILOT LNG LLC: COMPANY OVERVIEW****12.2.13 ANTHONY VEDER****TABLE 290 ANTHONY VEDER: COMPANY OVERVIEW****12.2.14 MCDERMOTT****TABLE 291 MCDERMOTT: COMPANY OVERVIEW****12.2.15 KC LNG****TABLE 292 KC LNG.: COMPANY OVERVIEW**

*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

13 ADJACENT & RELATED MARKET**13.1 INTRODUCTION****13.2 LIMITATIONS****13.3 LNG STORAGE TANK****13.3.1 MARKET DEFINITION****13.3.2 MARKET OVERVIEW****13.4 LNG STORAGE TANK MARKET, BY TYPE****TABLE 293 LNG STORAGE TANK MARKET, BY TYPE, 2020–2027 (USD MILLION)****TABLE 294 LNG STORAGE TANK MARKET, BY TYPE, 2020–2027 (MILLION
SQUARE METER)****13.5 LNG STORAGE TANKMARKET, BY MATERIAL****TABLE 295 LNG STORAGE TANK MARKET, BY MATERIAL, 2020–2027 (USD
MILLION)****TABLE 296 LNG STORAGE TANK MARKET, BY MATERIAL, 2020–2027 (MILLION**

SQUARE METERS)

13.6 LNG STORAGE TANK MARKET, BY REGION

TABLE 297 LNG STORAGE TANK MARKET, BY REGION, 2020–2027 (USD MILLION)

TABLE 298 LNG STORAGE TANK MARKET, BY REGION, 2020–2027 (MILLION
SQUARE METERS)

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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