

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:

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