

Sustainable Fuel Market by Type (Renewable Fuels, Low Carbon Fossil Fuels), Fuel Type (Biofuels, E-Fuels, Hydrogen, Biomethane, CNG), End User (Road transportation, Marine, Aviation), State (Liquid, Gas) and Region - Global Forecast to 2029

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Abstracts

The global sustainable fuel market is estimated to grow from USD 193.8 billion in 2024 to USD 299.9 billion by 2029; it is expected to record a CAGR of 9.1% during the forecast period. Governments are enacting strict regulations and providing incentives to encourage the use of sustainable fuels. Additionally, the increasing global awareness of the necessity to combat climate change is propelling the sustainable fuel market. Furthermore, Sustainable fuels such as biofuels and green hydrogen contribute to diversifying energy sources and decreasing dependence on imported oil, thereby enhancing national energy security.

“Biofuels: The largest segment of the sustainable fuel market, by fuel type. “

Based on fuel type, the sustainable fuel market has been segmented into Biofuels, E-fuels, Hydrogen, Biomethane, and Compressed Natural Gas. The Biofuels segment is expected to be the largest segment during the forecast period. According to National Renewable Energy Laboratory (NREL), biofuels have the potential to reduce greenhouse gas emissions by 68% to 73% if equal volume of biofuel is substituted with petroleum-based fuels; therefore the need to reduce greenhouse gas emissions to boost the growth of the biofuels during the forecast period.

“Renewable fuels are expected to be the largest segment during the forecast period based on type.”

By type, the sustainable fuel market has been split into two types: renewable fuels and low carbon fossil fuels. The renewable fuels segment is expected to hold the largest market share during the forecast period. The goal of global economies to minimize their carbon footprint and greenhouse gas emissions has driven the adoption of clean and green energy alternatives. The rising energy demand, propelled by rapid industrialization and urbanization, has further hastened the shift towards renewable energy. Consequently, economies are increasingly utilizing renewable energy sources such as biomass, hydroelectric, and geothermal power.

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

Based on the State, the sustainable fuel market is segmented into liquid, and gas. The liquid segment is expected to be the largest growing segment of the sustainable fuel market during the forecast period. Liquid fuels have higher energy density compared to gases such as CNG, biomethane and hydrogen. Higher energy density refers to high amounts of energy per unit of volume. The higher density of liquid fuels is expected to drive the growth of the liquid segment during the forecast period.

“North America is expected to be the largest region in the sustainable fuel market.”

North America is expected to be the largest region in the sustainable fuel market during the forecast period. The growth is attributed to the enforcement of strict pollution control regulations, GHG emissions reduction efforts, and rising preference for low carbon and renewable energy alternatives. Reflecting the global trend towards sustainable fuels, investments in North America are increasing. These increasing investments in sustainable fuels boost the market growth during forecast period in 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 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- 25%, Europe- 25%, Asia Pacific- 30%, Middle East & Africa- 10%, South America-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 2023. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The sustainable fuel market is dominated by a few major players that have a wide regional presence. The leading players in the sustainable fuel market are ADM (US), Shell plc (UK), Saudi Arabian Oil Co. (Saudi Arabia), Siemens Energy (Germany) and Chevron Corporation (US). The major strategy adopted by the players includes new product launches, partnerships, collaboration, mergers, and investments & expansions.

Research Coverage:

The report defines, describes, and forecasts the global sustainable fuel market by fuel type, state, type, end user 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 sustainable fuel market.

Key Benefits of Buying the Report

Increasing emphasis on net zero emission and supportive government policies are few of the key factors driving the sustainable fuel market. Factors such as limited availability and infrastructure of sustainable fuel restrain the growth of the market. The growing energy transition towards reducing carbon emission is expected to present lucrative opportunities for the players operating in the sustainable fuel market.

Product Development/ Innovation: The sustainable fuel market is witnessing significant product development and innovation, driven by the growing demand for environmentally friendly fuels to curb the transportation emissions. Companies are investing in developing advanced sustainable fuel technologies.

Market Development: ADM and Gevo, Inc., a pioneer in transforming renewable energy into low-carbon, energy-dense liquid hydrocarbons, announced that they

have signed a memorandum of understanding (MoU) to support the production of sustainable aviation fuel (SAF) and other low carbon-footprint hydrocarbon fuels.

Market Diversification: Repsol has begun its first renewable hydrogen in the Petronor industrial area in Biscay, Spain. With an expenditure of 11 million euros, this renewable hydrogen is used in the refinery itself, lowering the carbon footprint of the products.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, like ADM (US), Shell plc (UK), Saudi Arabian Oil Co. (Saudi Arabia), Siemens Energy (Germany) and Chevron Corporation (US) among others in the sustainable fuel market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

1.3.1 INCLUSIONS AND EXCLUSIONS

1.3.2 MARKETS COVERED

FIGURE 1 SUSTAINABLE FUEL MARKET: SEGMENTATION

1.3.3 REGIONS COVERED

1.3.4 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

1.5 UNITS CONSIDERED

1.6 RESEARCH LIMITATIONS

1.7 STAKEHOLDERS

1.8 RECESSION IMPACT

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 SUSTAINABLE FUEL MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 List of major secondary sources

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 List of key primary interview participants

2.1.2.2 Key data from primary sources

2.1.2.3 Key industry insights

2.1.2.4 Breakdown of primaries

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.2.2 TOP-DOWN APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.3 DEMAND-SIDE ANALYSIS

2.3.1 DEMAND-SIDE METRICS

FIGURE 5 KEY METRICS CONSIDERED TO ASSESS DEMAND FOR SUSTAINABLE FUELS

2.3.1.1 Assumptions for demand-side analysis

2.3.1.2 Calculations for demand-side analysis

2.4 SUPPLY-SIDE ANALYSIS

2.4.1 SUPPLY-SIDE METRICS

FIGURE 6 KEY METRICS CONSIDERED TO ASSESS SUPPLY OF SUSTAINABLE FUELS

FIGURE 7 SUSTAINABLE FUEL MARKET: SUPPLY-SIDE ANALYSIS

2.4.1.1 Assumptions for supply-side analysis

2.4.1.2 Calculations for supply-side analysis

2.5 DATA TRIANGULATION

FIGURE 8 SUSTAINABLE FUEL MARKET: DATA TRIANGULATION

2.6 GROWTH FORECAST

2.7 RISK ASSESSMENT

2.8 IMPACT OF RECESSION

3 EXECUTIVE SUMMARY

TABLE 1 SUSTAINABLE FUEL MARKET SNAPSHOT

FIGURE 9 RENEWABLE FUELS SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 10 BIOFUELS SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE IN 2029

FIGURE 11 LIQUID SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 12 ROAD TRANSPORTATION SEGMENT TO ACCOUNT FOR LARGEST SHARE IN 2029

FIGURE 13 NORTH AMERICA HELD LARGEST SHARE OF SUSTAINABLE FUEL MARKET IN 2023

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SUSTAINABLE FUEL MARKET

FIGURE 14 INCREASE IN DEMAND FOR CLEAN ENERGY AND GOVERNMENT POLICIES TO DRIVE SUSTAINABLE FUEL MARKET DURING FORECAST PERIOD

4.2 SUSTAINABLE FUEL MARKET, BY REGION

FIGURE 15 ASIA PACIFIC TO WITNESS FASTEST GROWTH DURING FORECAST PERIOD

4.3 SUSTAINABLE FUEL MARKET, BY TYPE

FIGURE 16 RENEWABLE FUELS SEGMENT DOMINATED MARKET IN 2023

4.4 SUSTAINABLE FUEL MARKET, BY FUEL TYPE

FIGURE 17 BIOFUELS SEGMENT HELD LARGEST MARKET SHARE IN 2023

4.5 SUSTAINABLE FUEL MARKET, BY STATE

FIGURE 18 LIQUID SEGMENT ACCOUNTED FOR LARGER SHARE OF MARKET IN 2023

4.6 SUSTAINABLE FUEL MARKET, BY END USER

FIGURE 19 ROAD TRANSPORTATION SEGMENT DOMINATED MARKET IN 2023

4.7 SUSTAINABLE FUEL MARKET IN NORTH AMERICA, BY END USER AND COUNTRY

FIGURE 20 ROAD TRANSPORTATION AND US LED MARKET IN NORTH AMERICA IN 2023

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 21 SUSTAINABLE FUEL MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Growing environmental concerns associated with conventional fuels

FIGURE 22 CARBON EMISSION DURING TRANSPORTATION, 2015–2022, 2030

5.2.1.2 Favorable government policies to reduce greenhouse emissions

5.2.1.3 Rising adoption of low-emission fuels

5.2.2 RESTRAINTS

5.2.2.1 Requirement of high initial capital investment

5.2.2.2 Growing competition from alternative fuels

5.2.3 OPPORTUNITIES

5.2.3.1 High depletion rate of fossil fuels

5.2.3.2 Transition toward renewable energy

FIGURE 23 RENEWABLE ENERGY CAPACITY ADDITIONS BY COUNTRY/REGION, 2019–2022

5.2.4 CHALLENGES

5.2.4.1 Limited commercial availability of hydrogen and biofuel-powered vehicles

5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 24 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

5.4 SUPPLY CHAIN ANALYSIS

FIGURE 25 SUSTAINABLE FUEL MARKET: SUPPLY CHAIN ANALYSIS

5.4.1 RAW MATERIAL SUPPLIERS/TECHNOLOGY & EPC PROVIDERS

5.4.2 SUSTAINABLE FUEL PRODUCERS/SUPPLIERS

5.4.3 END USERS

5.5 ECOSYSTEM/MARKET MAP

FIGURE 26 SUSTAINABLE FUEL MARKET MAP

TABLE 2 ROLE OF PLAYERS IN SUSTAINABLE FUEL MARKET ECOSYSTEM

FIGURE 27 ECOSYSTEM ANALYSIS

5.6 CASE STUDY ANALYSIS

5.6.1 PRIO HELPED CARRIS ACHIEVE SUSTAINABLE MOBILITY IN URBAN SETTING

5.6.2 CROWN IRON WORKS (CIW) INTRODUCED RD-READY PRETREATMENT SYSTEM TO INCREASE BIODIESEL PRODUCTION EFFICIENCY

5.6.3 ENVIROGAS RNG PROJECT CAPTURED SIGNIFICANT AMOUNT OF METHANE

5.7 INVESTMENT AND FUNDING SCENARIO

FIGURE 28 INVESTMENT AND FUNDING SCENARIO

5.8 TECHNOLOGY ANALYSIS

5.8.1 KEY TECHNOLOGY

5.8.1.1 Biogas transformation to biomethane

5.8.1.2 Electrolysis for hydrogen production

5.8.2 COMPLEMENTARY TECHNOLOGY

5.8.2.1 Material-based hydrogen storage

5.8.2.2 Machine learning

5.8.3 ADJACENT TECHNOLOGY

5.8.3.1 Carbon capture, utilization, and storage

5.8.3.2 Fuel cell

5.9 TRADE ANALYSIS

5.9.1 E-FUELS

5.9.1.1 Import scenario

TABLE 3 IMPORT DATA FOR HS CODE 2814-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 29 HS CODE 2814: IMPORT DATA FOR TOP FIVE COUNTRIES, 2021–2023

5.9.1.2 Export scenario

TABLE 4 EXPORT DATA FOR HS CODE 2814-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 30 HS CODE 2814: EXPORT DATA FOR TOP FIVE COUNTRIES, 2021–2023

5.9.2 BIOFUELS

5.9.2.1 Import scenario

TABLE 5 IMPORT DATA FOR HS CODE 3826-COMPLIANT PRODUCTS, BY COUNTRY, 2020–2023 (USD THOUSAND)

FIGURE 31 HS CODE 3826: IMPORT DATA FOR TOP FIVE COUNTRIES, 2021–2023 (USD THOUSAND)

5.9.2.2 Export scenario

TABLE 6 EXPORT DATA FOR HS CODE 3826-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 32 HS CODE 3826: EXPORT DATA FOR TOP FIVE COUNTRIES, 2021–2023 (USD THOUSAND)

5.9.3 HYDROGEN

5.9.3.1 Import scenario

TABLE 7 IMPORT DATA FOR HS CODE 280410-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 33 HS CODE 280410: IMPORT DATA FOR TOP FIVE COUNTRIES, 2020–2022 (USD THOUSAND)

5.9.3.2 Export scenario

TABLE 8 EXPORT DATA FOR HS CODE 280410-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 34 HS CODE 280410: EXPORT DATA FOR TOP FIVE COUNTRIES, 2020–2023 (USD THOUSAND)

5.9.4 BIOMETHANE

5.9.4.1 Import scenario

TABLE 9 IMPORT DATA FOR HS CODE 271111-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 35 HS CODE 271111: IMPORT DATA FOR TOP FIVE COUNTRIES, 2020–2023 (USD THOUSAND)

5.9.4.2 Export scenario

TABLE 10 EXPORT DATA FOR HS CODE 271111-COMPLIANT PRODUCTS, BY COUNTRY, 2021–2023 (USD THOUSAND)

FIGURE 36 HS CODE 271111: EXPORT DATA FOR TOP FIVE COUNTRIES, 2020–2023 (USD THOUSAND)

5.10 PATENT ANALYSIS

5.10.1 HYDROGEN

FIGURE 37 HYDROGEN: INNOVATIONS AND PATENT REGISTRATIONS, 2013–2023

5.10.1.1 List of major patents

TABLE 11 HYDROGEN: LIST OF MAJOR PATENTS, 2019–2023

5.10.2 E-FUELS

FIGURE 38 E-FUELS: INNOVATIONS AND PATENT REGISTRATIONS, 2013–2023

5.10.2.1 List of major patents

TABLE 12 E-FUELS: LIST OF MAJOR PATENTS, 2019–2023

5.10.3 BIOFUELS

FIGURE 39 BIOFUELS: INNOVATIONS AND PATENT REGISTRATIONS, 2013–2023

5.10.3.1 List of major patents

TABLE 13 BIOFUELS: LIST OF MAJOR PATENTS, 2019–2023

5.10.4 BIOMETHANE

FIGURE 40 BIOMETHANE: INNOVATIONS AND PATENT REGISTRATIONS, 2013–2023

5.10.4.1 List of major patents

TABLE 14 BIOMETHANE: LIST OF MAJOR PATENTS, 2019–2023

5.11 KEY CONFERENCES AND EVENTS IN 2024–2025

TABLE 15 SUSTAINABLE FUEL MARKET: KEY CONFERENCES AND EVENTS, 2024–2025

5.12 PRICING ANALYSIS

5.12.1 INDICATIVE PRICING ANALYSIS, BY FUEL TYPE

TABLE 16 INDICATIVE PRICING ANALYSIS, BY FUEL TYPE (USD/KG)

5.12.2 AVERAGE SELLING PRICE TREND, BY REGION

TABLE 17 AVERAGE SELLING PRICE TREND, BY REGION (USD/KG)

5.13 REGULATORY LANDSCAPE

5.13.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 19 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 20 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 21 MIDDLE EAST & AFRICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 22 SOUTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.13.2 SUSTAINABLE FUEL MARKET: REGULATORY FRAMEWORK

TABLE 23 SUSTAINABLE FUEL MARKET: REGULATIONS

5.14 PORTER'S FIVE FORCES ANALYSIS

FIGURE 41 SUSTAINABLE FUEL MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 24 SUSTAINABLE FUEL MARKET: PORTER'S FIVE FORCES ANALYSIS

5.14.1 THREAT OF NEW ENTRANTS

5.14.2 THREAT OF SUBSTITUTES

5.14.3 BARGAINING POWER OF SUPPLIERS

5.14.4 BARGAINING POWER OF BUYERS

5.14.5 INTENSITY OF COMPETITIVE RIVALRY

5.15 KEY STAKEHOLDERS AND BUYING CRITERIA

5.15.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 42 INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS, BY END USER

TABLE 25 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY END USER (%)

5.15.2 BUYING CRITERIA

FIGURE 43 KEY BUYING CRITERIA, BY END USER

TABLE 26 KEY BUYING CRITERIA, BY END USER

6 SUSTAINABLE FUEL MARKET, BY TYPE

6.1 INTRODUCTION

FIGURE 44 SUSTAINABLE FUEL MARKET SHARE, BY TYPE, 2023 (%)

TABLE 27 SUSTAINABLE FUEL MARKET, BY TYPE, 2019–2023 (USD MILLION)

TABLE 28 SUSTAINABLE FUEL MARKET, BY TYPE, 2024–2029 (USD MILLION)

6.2 RENEWABLE FUELS

6.2.1 TRANSITIONING TOWARD RENEWABLE ENERGY TO DRIVE DEMAND

TABLE 29 RENEWABLE FUELS: SUSTAINABLE FUEL MARKET, BY TYPE, 2019–2023 (USD MILLION)

TABLE 30 RENEWABLE FUELS: SUSTAINABLE FUEL MARKET, BY TYPE, 2024–2029 (USD MILLION)

6.3 LOW-CARBON FOSSIL FUELS

6.3.1 DEMAND FOR COST-EFFECTIVE TRANSPORTATION FUEL TO DRIVE MARKET

TABLE 31 LOW-CARBON FOSSIL FUELS: SUSTAINABLE FUEL MARKET, BY TYPE, 2019–2023 (USD MILLION)

TABLE 32 LOW-CARBON FOSSIL FUELS: SUSTAINABLE FUEL MARKET, BY TYPE, 2024–2029 (USD MILLION)

7 SUSTAINABLE FUEL MARKET, BY FUEL TYPE

7.1 INTRODUCTION

FIGURE 45 SUSTAINABLE FUEL MARKET SHARE, BY FUEL TYPE, 2023 (%)

TABLE 33 SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (MILLION TONS)

TABLE 34 SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (MILLION TONS)

TABLE 35 SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 36 SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

7.2 E-FUELS

7.2.1 CLEAN ENERGY INITIATIVES BY GOVERNMENTS TO DRIVE DEMAND

TABLE 37 E-FUELS: SUSTAINABLE FUEL MARKET, BY E-FUELS TYPE, 2019–2023 (USD MILLION)

TABLE 38 E-FUELS: SUSTAINABLE FUEL MARKET, BY E-FUELS TYPE, 2024–2029 (USD MILLION)

TABLE 39 E-FUELS: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 40 E-FUELS: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

7.2.1.1 E-Methane

7.2.1.2 E-Methanol

7.2.1.3 E-Ammonia

7.2.1.4 E-Gasoline

7.2.1.5 E-Kerosene

7.2.1.6 E-Diesel

7.3 BIOFUELS

7.3.1 MANDATES, TAX CREDITS, AND INVESTMENTS TO DRIVE MARKET

TABLE 41 BIOFUELS: SUSTAINABLE FUEL MARKET, BY BIOFUELS TYPE, 2019–2023 (USD MILLION)

TABLE 42 BIOFUELS: SUSTAINABLE FUEL MARKET, BY BIOFUELS TYPE, 2024–2029 (USD MILLION)

TABLE 43 BIOFUELS: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 44 BIOFUELS: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

7.3.1.1 Ethanol

7.3.1.2 Biodiesel

7.3.1.3 Renewable diesel

7.3.1.4 Biojet

7.4 HYDROGEN

7.4.1 STRICT REGULATIONS ON CURBING EMISSIONS TO DRIVE MARKET

TABLE 45 HYDROGEN: SUSTAINABLE FUEL MARKET, BY HYDROGEN TYPE, 2019–2023 (USD MILLION)

TABLE 46 HYDROGEN: SUSTAINABLE FUEL MARKET, BY HYDROGEN TYPE,

2024–2029 (USD MILLION)

TABLE 47 HYDROGEN: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023
(USD MILLION)

TABLE 48 HYDROGEN: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029
(USD MILLION)

7.4.1.1 Blue hydrogen

7.4.1.2 Green hydrogen

7.5 BIOMETHANE

7.5.1 GROWING FOCUS ON RENEWABLE ENERGY TO DRIVE MARKET

TABLE 49 BIOMETHANE: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023
(USD MILLION)

TABLE 50 BIOMETHANE: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029
(USD MILLION)

7.6 COMPRESSED NATURAL GAS

7.6.1 GROWING DEMAND FOR COST-EFFECTIVE FUEL TO DRIVE MARKET

TABLE 51 COMPRESSED NATURAL GAS: SUSTAINABLE FUEL MARKET, BY
REGION, 2019–2023 (USD MILLION)

TABLE 52 COMPRESSED NATURAL GAS: SUSTAINABLE FUEL MARKET, BY
REGION, 2024–2029 (USD MILLION)

8 SUSTAINABLE FUEL MARKET, BY STATE

8.1 INTRODUCTION

FIGURE 46 SUSTAINABLE FUEL MARKET SHARE, BY STATE, 2023 (%)

TABLE 53 SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 54 SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

8.2 LIQUID

8.2.1 HIGH ENERGY DENSITY OF LIQUID FUELS TO DRIVE DEMAND

TABLE 55 LIQUID: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD
MILLION)

TABLE 56 LIQUID: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD
MILLION)

8.3 GAS

8.3.1 CONTRIBUTION OF GAS IN ENERGY SECURITY TO DRIVE MARKET

TABLE 57 GAS: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD
MILLION)

TABLE 58 GAS: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD
MILLION)

9 SUSTAINABLE FUEL MARKET, BY END USER

9.1 INTRODUCTION

FIGURE 47 SUSTAINABLE FUEL MARKET SHARE, BY END USER, 2023 (%)

TABLE 59 SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 60 SUSTAINABLE FUEL MARKET, BY END USER, 2024–2029 (USD MILLION)

9.2 ROAD TRANSPORTATION

9.2.1 COMPATIBILITY OF SUSTAINABLE FUELS WITH EXISTING ENGINES AND INFRASTRUCTURE TO DRIVE MARKET

TABLE 61 ROAD TRANSPORTATION: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 62 ROAD TRANSPORTATION: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

9.2.1.1 Two- and three-wheelers

9.2.1.2 Passenger cars

9.2.1.3 Commercial/Heavy-duty vehicles

9.3 AVIATION

9.3.1 TRANSITION TO NET-ZERO EMISSION SUPPORTED BY SHIFT TOWARD SUSTAINABLE FUELS

TABLE 63 AVIATION: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 64 AVIATION: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

9.4 MARINE

9.4.1 ENFORCEMENT OF STRICT EMISSION REGULATIONS TO DRIVE MARKET

TABLE 65 MARINE: SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 66 MARINE: SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

10 SUSTAINABLE FUEL MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 48 ASIA PACIFIC TO EXHIBIT HIGHEST CAGR DURING FORECAST PERIOD

FIGURE 49 NORTH AMERICA ACCOUNTED FOR LARGEST SHARE OF SUSTAINABLE FUEL MARKET IN 2023

TABLE 67 SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (MILLION TONS)

TABLE 68 SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (MILLION TONS)

TABLE 69 SUSTAINABLE FUEL MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 70 SUSTAINABLE FUEL MARKET, BY REGION, 2024–2029 (USD MILLION)

10.2 ASIA PACIFIC

10.2.1 RECESSION IMPACT

10.2.2 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY FUEL TYPE

TABLE 71 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 72 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.3 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY STATE

TABLE 73 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 74 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

10.2.4 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY END USER

TABLE 75 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 76 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.5 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY COUNTRY

TABLE 77 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 78 ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.2.5.1 China

10.2.5.1.1 Increasing investment in sustainable fuels to drive market

TABLE 79 CHINA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 80 CHINA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.5.2 India

10.2.5.2.1 Rising adoption of clean energy and transition to a circular economy to foster growth

TABLE 81 INDIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 82 INDIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.5.3 Japan

10.2.5.3.1 Ongoing net zero carbon emission initiatives to drive market

TABLE 83 JAPAN: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 84 JAPAN: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.5.4 Australia

10.2.5.4.1 Development and commercialization of sustainable fuels to boost market

TABLE 85 AUSTRALIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 86 AUSTRALIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.5.5 South Korea

10.2.5.5.1 Measures for sustainable shipping and aviation to drive market

TABLE 87 SOUTH KOREA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 88 SOUTH KOREA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.2.5.6 Rest of Asia Pacific

TABLE 89 REST OF ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 90 REST OF ASIA PACIFIC: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.3 EUROPE

FIGURE 50 EUROPE: REGIONAL SNAPSHOT

10.3.1 RECESSION IMPACT

10.3.2 EUROPE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE

TABLE 91 EUROPE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 92 EUROPE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.3.3 EUROPE: SUSTAINABLE FUEL MARKET, BY STATE

TABLE 93 EUROPE: SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 94 EUROPE: SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

10.3.4 EUROPE: SUSTAINABLE FUEL MARKET, BY END USER

TABLE 95 EUROPE: SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 96 EUROPE: SUSTAINABLE FUEL MARKET, BY APPLICATION, 2024–2029
(USD MILLION)

10.3.5 EUROPE: SUSTAINABLE FUEL MARKET, BY COUNTRY

TABLE 97 EUROPE: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023
(USD MILLION)

TABLE 98 EUROPE: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2024–2029
(USD MILLION)

10.3.5.1 Germany

10.3.5.1.1 Launch of new schemes such as Neste Impact to boost demand for
biofuels

TABLE 99 GERMANY: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023
(USD MILLION)

TABLE 100 GERMANY: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029
(USD MILLION)

10.3.5.2 UK

10.3.5.2.1 Strategic investments in biofuels to drive market

TABLE 101 UK: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD
MILLION)

TABLE 102 UK: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD
MILLION)

10.3.5.3 France

10.3.5.3.1 Upcoming incentives and policies to propel sustainable fuel market

TABLE 103 FRANCE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023
(USD MILLION)

TABLE 104 FRANCE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029
(USD MILLION)

10.3.5.4 Norway

10.3.5.4.1 Commercialization of sustainable fuels by government and corporate
sector to boost market

TABLE 105 NORWAY: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023
(USD MILLION)

TABLE 106 NORWAY: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029
(USD MILLION)

10.3.5.5 Rest of Europe

TABLE 107 REST OF EUROPE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE,
2019–2023 (USD MILLION)

TABLE 108 REST OF EUROPE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE,
2024–2029 (USD MILLION)

10.4 MIDDLE EAST & AFRICA

10.4.1 RECESSION IMPACT

10.4.2 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE

TABLE 109 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 110 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.4.3 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY STATE

TABLE 111 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 112 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

10.4.4 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY END USER

TABLE 113 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 114 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY END USER, 2024–2029 (USD MILLION)

10.4.5 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY COUNTRY

TABLE 115 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 116 MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.4.5.1 GCC countries

TABLE 117 GCC COUNTRIES: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 118 GCC COUNTRIES: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.4.5.1.1 Saudi Arabia

10.4.5.1.1.1 Major investments in sustainable and low-carbon transportation fuels to boost market

TABLE 119 SAUDI ARABIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 120 SAUDI ARABIA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.4.5.1.2 UAE

10.4.5.1.2.1 Advanced biofuel policy for sustainable aviation and energy sector to drive market

TABLE 121 UAE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 122 UAE: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD

MILLION)

10.4.5.1.3 Rest of GCC countries

TABLE 123 REST OF GCC COUNTRIES: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 124 REST OF GCC COUNTRIES: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.4.5.2 South Africa

10.4.5.2.1 Advanced green energy transition to drive market

TABLE 125 SOUTH AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 126 SOUTH AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.4.5.3 Rest of Middle East & Africa

TABLE 127 REST OF MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 128 REST OF MIDDLE EAST & AFRICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.5 NORTH AMERICA

FIGURE 51 NORTH AMERICA: REGIONAL SNAPSHOT

10.5.1 RECESSION IMPACT

10.5.2 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE

TABLE 129 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 130 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.5.3 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE

TABLE 131 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 132 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

10.5.4 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER

TABLE 133 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 134 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.5 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY

TABLE 135 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 136 NORTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY,

2024–2029 (USD MILLION)

10.5.5.1 US

10.5.5.1.1 Increasing demand for sustainable fuels in aviation and marine industries to drive market

TABLE 137 US: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 138 US: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD BILLION)

10.5.5.2 Canada

10.5.5.2.1 Rising need for climate change mitigation to boost demand for sustainable fuels

TABLE 139 CANADA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 140 CANADA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD BILLION)

10.5.5.3 Mexico

10.5.5.3.1 Increasing demand for hydrogen and CNG vehicles to drive market

TABLE 141 MEXICO: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 142 MEXICO: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD BILLION)

10.6 SOUTH AMERICA

10.6.1 RECESSION IMPACT

10.6.2 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE

TABLE 143 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 144 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.6.3 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE

TABLE 145 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE, 2019–2023 (USD MILLION)

TABLE 146 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY STATE, 2024–2029 (USD MILLION)

10.6.4 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER

TABLE 147 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 148 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY END USER, 2024–2029 (USD MILLION)

10.6.5 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY

TABLE 149 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 150 SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.6.5.1 Brazil

10.6.5.1.1 Rising demand for clean hydrogen in transportation sector to boost market

TABLE 151 BRAZIL: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 152 BRAZIL: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.6.5.2 Argentina

10.6.5.2.1 Surge in gasoline demand to drive market

TABLE 153 ARGENTINA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 154 ARGENTINA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

10.6.5.3 Rest of South America

TABLE 155 REST OF SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2019–2023 (USD MILLION)

TABLE 156 REST OF SOUTH AMERICA: SUSTAINABLE FUEL MARKET, BY FUEL TYPE, 2024–2029 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 KEY STRATEGIES/RIGHT TO WIN

TABLE 157 SUSTAINABLE FUEL MARKET: OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS, 2019–2024

11.3 MARKET SHARE ANALYSIS OF KEY PLAYERS, 2023

FIGURE 52 SUSTAINABLE FUEL MARKET: MARKET SHARE ANALYSIS, 2023

11.3.1 MARKET RANKING ANALYSIS

FIGURE 53 RANKING OF KEY PLAYERS IN SUSTAINABLE FUEL MARKET

11.3.2 MARKET EVALUATION FRAMEWORK, 2020–2024

TABLE 159 SUSTAINABLE FUEL MARKET: MARKET EVALUATION FRAMEWORK, 2020–2024

11.4 REVENUE ANALYSIS OF KEY PLAYERS

FIGURE 54 SUSTAINABLE FUEL MARKET: REVENUE ANALYSIS OF TEN KEY PLAYERS, 2019–2023

11.5 COMPANY VALUATION AND FINANCIAL MATRIX

FIGURE 55 SUSTAINABLE FUEL MARKET: COMPANY VALUATION

FIGURE 56 SUSTAINABLE FUEL MARKET: FINANCIAL MATRIX

11.6 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

11.6.1 STARS

11.6.2 EMERGING LEADERS

11.6.3 PERVASIVE PLAYERS

11.6.4 PARTICIPANTS

FIGURE 57 SUSTAINABLE FUEL MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

11.6.5 COMPANY FOOTPRINT: KEY PLAYERS

11.6.5.1 Company footprint

FIGURE 58 SUSTAINABLE FUEL MARKET: COMPANY OVERALL FOOTPRINT

11.6.5.2 Product footprint

FIGURE 59 SUSTAINABLE FUEL MARKET: COMPANY PRODUCT FOOTPRINT

11.6.5.3 Market footprint

FIGURE 60 SUSTAINABLE FUEL MARKET: COMPANY MARKET FOOTPRINT

11.6.5.4 Regional footprint

TABLE 160 SUSTAINABLE FUEL MARKET: REGION FOOTPRINT

11.6.5.5 Fuel type footprint

TABLE 161 SUSTAINABLE FUEL MARKET: FUEL TYPE FOOTPRINT

11.6.5.6 State footprint

TABLE 162 SUSTAINABLE FUEL MARKET: STATE FOOTPRINT

11.6.5.7 End user footprint

TABLE 163 SUSTAINABLE FUEL MARKET: END USER FOOTPRINT

11.6.5.8 Type footprint

TABLE 164 SUSTAINABLE FUEL MARKET: TYPE FOOTPRINT

11.7 BRAND/PRODUCT COMPARATIVE ANALYSIS

11.8 COMPANY EVALUATION MATRIX: OTHER PLAYERS, 2023

11.8.1 STARS

11.8.2 EMERGING LEADERS

11.8.3 PERVASIVE PLAYERS

11.8.4 PARTICIPANTS

FIGURE 61 SUSTAINABLE FUEL MARKET: COMPANY EVALUATION MATRIX (OTHER PLAYERS), 2023

11.8.5 COMPANY FOOTPRINT: OTHER PLAYERS, 2023

11.8.5.1 Company footprint

FIGURE 62 SUSTAINABLE FUEL MARKET: COMPANY OVERALL FOOTPRINT (OTHER PLAYERS)

11.8.5.2 Regional footprint

TABLE 165 SUSTAINABLE FUEL MARKET: REGION FOOTPRINT (OTHER PLAYERS)

11.8.5.3 Fuel type footprint

TABLE 166 SUSTAINABLE FUEL MARKET: FUEL TYPE FOOTPRINT (OTHER PLAYERS)

11.8.5.4 State footprint

TABLE 167 SUSTAINABLE FUEL MARKET: STATE FOOTPRINT (OTHER PLAYERS)

11.8.5.5 Type footprint

TABLE 168 SUSTAINABLE FUEL MARKET: TYPE FOOTPRINT (OTHER PLAYERS)

11.8.5.6 End user footprint

TABLE 169 SUSTAINABLE FUEL MARKET: END USER FOOTPRINT (OTHER PLAYERS)

11.9 COMPETITIVE SCENARIO AND TRENDS

11.9.1 PRODUCT LAUNCHES

TABLE 170 SUSTAINABLE FUEL MARKET: PRODUCT LAUNCHES, JANUARY 2020–APRIL 2024

11.9.2 DEALS

TABLE 171 SUSTAINABLE FUEL MARKET: DEALS, JANUARY 2020–APRIL 2024

11.9.3 EXPANSION

TABLE 172 SUSTAINABLE FUEL MARKET: EXPANSION, JANUARY 2020–APRIL 2024

11.9.4 OTHER DEVELOPMENTS

TABLE 173 SUSTAINABLE FUEL MARKET: OTHER DEVELOPMENTS, JANUARY 2020–APRIL 2024

12 COMPANY PROFILES

(Business overview, Products/Services/Solutions offered, Recent Developments, MNM view)*

12.1 KEY COMPANIES

12.1.1 CHEVRON CORPORATION

TABLE 174 CHEVRON CORPORATION: COMPANY OVERVIEW

FIGURE 63 CHEVRON CORPORATION: COMPANY SNAPSHOT

TABLE 175 CHEVRON CORPORATION: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 176 CHEVRON CORPORATION: PRODUCT LAUNCHES

TABLE 177 CHEVRON CORPORATION: DEALS

TABLE 178 CHEVRON CORPORATION: EXPANSION

12.1.2 ADM

TABLE 179 ADM: COMPANY OVERVIEW

FIGURE 64 ADM: COMPANY SNAPSHOT

TABLE 180 ADM: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 181 ADM: DEALS

TABLE 182 ADM: OTHER DEVELOPMENTS

12.1.3 CNPC

TABLE 183 CNPC: COMPANY OVERVIEW

FIGURE 65 CNPC: COMPANY SNAPSHOT

TABLE 184 CNPC: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 185 CNPC: DEALS

TABLE 186 CNPC: EXPANSION

12.1.4 SHELL PLC

TABLE 187 SHELL PLC: COMPANY OVERVIEW

FIGURE 66 SHELL PLC: COMPANY SNAPSHOT

TABLE 188 SHELL PLC: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 189 SHELL PLC: PRODUCT LAUNCHES

TABLE 190 SHELL PLC: DEALS

TABLE 191 SHELL PLC: EXPANSION

12.1.5 SAUDI ARABIAN OIL CO.

TABLE 192 SAUDI ARABIAN OIL CO.: COMPANY OVERVIEW

FIGURE 67 SAUDI ARABIAN OIL CO.: COMPANY SNAPSHOT

TABLE 193 SAUDI ARABIAN OIL CO.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 194 SAUDI ARABIAN OIL CO.: DEALS

TABLE 195 SAUDI ARABIAN OIL CO.: EXPANSION

12.1.6 TOTALENERGIES

TABLE 196 TOTALENERGIES: COMPANY OVERVIEW

TABLE 197 TOTALENERGIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 198 TOTALENERGIES: PRODUCT LAUNCHES

TABLE 199 TOTALENERGIES: DEALS

12.1.7 AIR LIQUIDE

TABLE 200 AIR LIQUIDE: COMPANY OVERVIEW

FIGURE 69 AIR LIQUIDE: COMPANY SNAPSHOT

TABLE 201 AIR LIQUIDE: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 202 AIR LIQUIDE: DEALS

TABLE 203 AIR LIQUIDE: OTHER DEVELOPMENTS

12.1.8 AUDI AG

TABLE 204 AUDI AG: COMPANY OVERVIEW

FIGURE 70 AUDI AG: COMPANY SNAPSHOT

TABLE 205 AUDI AG: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 206 AUDI AG: PRODUCT LAUNCHES

12.1.9 SIEMENS ENERGY

TABLE 207 SIEMENS ENERGY: COMPANY OVERVIEW

FIGURE 71 SIEMENS ENERGY: COMPANY SNAPSHOT

TABLE 208 SIEMENS ENERGY: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 209 SIEMENS ENERGY: DEALS

12.1.10 GASUM LTD.

TABLE 210 GASUM LTD.: COMPANY OVERVIEW

FIGURE 72 GASUM LTD.: COMPANY SNAPSHOT

TABLE 211 GASUM LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 212 GASUM LTD.: DEALS

TABLE 213 GASUM LTD.: OTHER DEVELOPMENTS

12.1.11 LINDE PLC

TABLE 214 LINDE PLC: COMPANY OVERVIEW

FIGURE 73 LINDE PLC: COMPANY SNAPSHOT

TABLE 215 LINDE PLC: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 216 LINDE PLC: PRODUCT LAUNCHES

TABLE 217 LINDE PLC: DEALS

TABLE 218 LINDE PLC: EXPANSION

12.1.12 AIR PRODUCTS AND CHEMICALS, INC.

TABLE 219 AIR PRODUCTS AND CHEMICALS, INC.: COMPANY OVERVIEW

FIGURE 74 AIR PRODUCTS AND CHEMICALS, INC.: COMPANY SNAPSHOT

TABLE 220 AIR PRODUCTS AND CHEMICALS, INC.:
PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 221 AIR PRODUCTS AND CHEMICALS, INC.: DEALS

TABLE 222 AIR PRODUCTS AND CHEMICALS, INC.: OTHER DEVELOPMENTS

12.1.13 ELECTROCHAEA GMBH

TABLE 223 ELECTROCHAEA GMBH: COMPANY OVERVIEW

TABLE 224 ELECTROCHAEA GMBH: PRODUCTS/SERVICES/SOLUTIONS
OFFERED

TABLE 225 ELECTROCHAEA GMBH: OTHER DEVELOPMENTS

12.1.14 VALERO

TABLE 226 VALERO: COMPANY OVERVIEW

FIGURE 75 VALERO: COMPANY SNAPSHOT

TABLE 227 VALERO: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 228 VALERO: DEALS

TABLE 229 VALERO: OTHER DEVELOPMENTS

12.1.15 NESTE

TABLE 230 NESTE: COMPANY OVERVIEW

FIGURE 76 NESTE: COMPANY SNAPSHOT

TABLE 231 NESTE: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 232 NESTE: DEALS

TABLE 233 NESTE: OTHER DEVELOPMENTS

12.1.16 CARGILL, INCORPORATED

TABLE 234 CARGILL, INCORPORATED: COMPANY OVERVIEW

FIGURE 77 CARGILL, INCORPORATED: COMPANY SNAPSHOT

TABLE 235 CARGILL, INCORPORATED: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 236 CARGILL, INCORPORATED: DEALS

TABLE 237 CARGILL, INCORPORATED: EXPANSION

12.1.17 NATURE ENERGY

TABLE 238 NATURE ENERGY: COMPANY OVERVIEW

TABLE 239 NATURE ENERGY: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 240 NATURE ENERGY: DEALS

TABLE 241 NATURE ENERGY: OTHER DEVELOPMENTS

12.1.18 ARCHAEA ENERGY INC.

TABLE 242 ARCHAEA ENERGY INC.: COMPANY OVERVIEW

TABLE 243 ARCHAEA ENERGY INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 244 ARCHAEA ENERGY INC.: DEALS

TABLE 245 ARCHAEA ENERGY INC.: EXPANSION

12.1.19 OPAL FUELS

TABLE 246 OPAL FUELS: COMPANY OVERVIEW

FIGURE 78 OPAL FUELS: COMPANY SNAPSHOT

TABLE 247 OPAL FUELS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 248 OPAL FUELS: DEALS

TABLE 249 OPAL FUELS: OTHER DEVELOPMENTS

12.1.20 REPSOL

TABLE 250 REPSOL: COMPANY OVERVIEW

FIGURE 79 REPSOL: COMPANY SNAPSHOT

TABLE 251 REPSOL: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 252 REPSOL: PRODUCT LAUNCHES

TABLE 253 REPSOL: DEALS

TABLE 254 REPSOL: OTHER DEVELOPMENTS

12.1.21 ENGIE

TABLE 255 ENGIE: COMPANY OVERVIEW

TABLE 256 ENGIE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 257 ENGIE: DEALS

TABLE 258 ENGIE: OTHER DEVELOPMENTS

12.1.22 INDIAN OIL CORPORATION LTD

TABLE 259 INDIAN OIL CORPORATION LTD.: COMPANY OVERVIEW

FIGURE 81 INDIAN OIL CORPORATION LTD.: COMPANY SNAPSHOT

TABLE 260 INDIAN OIL CORPORATION LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 261 INDIAN OIL CORPORATION LTD.: PRODUCT LAUNCHES

TABLE 262 INDIAN OIL CORPORATION LTD.: DEALS

12.1.23 BP P.L.C.

TABLE 263 BP P.L.C.: COMPANY OVERVIEW

FIGURE 82 BP P.L.C.: COMPANY SNAPSHOT

TABLE 264 BP P.L.C.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 265 BP P.L.C.: DEALS

TABLE 266 BP P.L.C.: EXPANSION

12.1.24 CONOCOPHILLIPS COMPANY

TABLE 267 CONOCOPHILLIPS COMPANY: COMPANY OVERVIEW

FIGURE 83 CONOCOPHILLIPS COMPANY: COMPANY SNAPSHOT

TABLE 268 CONOCOPHILLIPS COMPANY: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 269 CONOCOPHILLIPS COMPANY: DEALS

12.2 OTHER PLAYERS

12.2.1 UNIPER SE

TABLE 270 UNIPER SE: COMPANY OVERVIEW

12.2.2 ØRSTED A/S

TABLE 271 ØRSTED A/S: COMPANY OVERVIEW

12.2.3 MAN ENERGY SOLUTIONS

TABLE 272 MAN ENERGY SOLUTIONS: COMPANY OVERVIEW

12.2.4 VERBIO SE

TABLE 273 VERBIO SE: COMPANY OVERVIEW

12.2.5 KINDER MORGAN

TABLE 274 KINDER MORGAN: COMPANY OVERVIEW

12.2.6 E.ON SE

TABLE 275 E.ON SE: COMPANY OVERVIEW

12.2.7 MESSER GROUP

TABLE 276 MESSER GROUP: COMPANY OVERVIEW

12.2.8 EQUINOR ASA

TABLE 277 EQUINOR ASA: COMPANY OVERVIEW

12.2.9 DR. ING. H.C. F. PORSCHE AG
TABLE 278 DR. ING. H.C. F. PORSCHE AG: COMPANY OVERVIEW

12.2.10 MITSUBISHI MOTORS CORPORATION
TABLE 279 MITSUBISHI MOTORS CORPORATION: COMPANY OVERVIEW

12.2.11 GREEN PLAINS INC.
TABLE 280 GREEN PLAINS INC.: COMPANY OVERVIEW

12.2.12 POET, LLC
TABLE 281 POET, LLC: COMPANY OVERVIEW

12.2.13 WILMAR INTERNATIONAL LTD.
TABLE 282 WILMAR INTERNATIONAL LTD.: COMPANY OVERVIEW

12.2.14 THE ANDERSONS, INC.
TABLE 283 THE ANDERSONS, INC.: COMPANY OVERVIEW

12.2.15 ENVITEC BIOGAS AG
TABLE 284 ENVITEC BIOGAS AG: COMPANY OVERVIEW

12.2.16 FUTURE BIOGAS LIMITED
TABLE 285 FUTURE BIOGAS LIMITED: COMPANY OVERVIEW

12.2.17 WAGA ENERGY
TABLE 286 WAGA ENERGY: COMPANY OVERVIEW

12.2.18 INFINIUM
TABLE 287 INFINIUM: COMPANY OVERVIEW

*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

13 APPENDIX

13.1 INSIGHTS FROM INDUSTRY EXPERTS

13.2 DISCUSSION GUIDE

13.3 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

13.4 CUSTOMIZATION OPTIONS

13.5 RELATED REPORTS

13.6 AUTHOR DETAILS

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