

Landfill Gas Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology (Combustion Engine, Turbines, Others), By Application (Utility Flares, Pipeline-Quality, Process Heater, Leachate Evaporation, Electricity Generation), By Region, By Competition, 2019-2029F

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Abstracts

Global Landfill Gas Market was valued at USD 2.08 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.19% through 2029.

The landfill gas market refers to the economic ecosystem centered around the collection, extraction, and utilization of gases produced during the natural decomposition of organic waste in landfills. Predominantly composed of methane and carbon dioxide, landfill gas poses both environmental challenges and opportunities. The market seeks to harness the potential of these gases as a valuable resource by implementing technologies to capture and convert them into energy.

This evolving market plays a critical role in addressing environmental concerns related to greenhouse gas emissions, particularly methane, a potent contributor to climate change. Governments, industries, and private entities are increasingly recognizing the economic and ecological advantages of converting landfill gas into electricity, heat, or usable fuel. Consequently, the landfill gas market is characterized by a complex interplay of regulatory frameworks, technological innovations, and economic incentives aimed at mitigating environmental impact while promoting sustainable waste management practices and contributing to the global transition towards renewable energy sources.

Key Market Drivers

Growing Awareness of Environmental Issues and Climate Change

The global landfill gas market is experiencing a significant boost due to the increasing awareness of environmental issues and the pressing concerns surrounding climate change. As societies become more conscious of the impact of human activities on the environment, there is a growing demand for sustainable solutions to manage waste and mitigate greenhouse gas emissions. Landfill gas, a byproduct of decomposing organic waste in landfills, contains methane, a potent greenhouse gas. The awareness of the environmental impact of methane emissions has led to a surge in initiatives aimed at harnessing landfill gas for energy production.

Governments, businesses, and communities worldwide are recognizing the need to transition towards cleaner and more sustainable energy sources. Landfill gas, once considered a nuisance, is now viewed as a valuable resource that can be tapped to generate electricity, heat, or used as a fuel source. This changing perception is a key driver propelling the global landfill gas market forward, with an increasing number of countries implementing policies and regulations to encourage the adoption of landfill gas-to-energy projects.

Stringent Environmental Regulations and Policies

Stringent environmental regulations and policies play a pivotal role in shaping the global landfill gas market. Governments worldwide are introducing and enforcing regulations to curb emissions, reduce landfill waste, and promote sustainable waste management practices. For instance, regulations mandating the installation of gas collection systems in landfills to capture and utilize methane have become commonplace. Compliance with these regulations not only helps mitigate environmental impact but also creates a favorable environment for the development of landfill gas projects.

Countries are adopting emission reduction targets and commitments under international agreements, such as the Paris Agreement, which further drive the need for sustainable waste management solutions. As a result, industries and municipalities are compelled to explore innovative methods to capture and utilize landfill gas to meet regulatory requirements. This regulatory landscape acts as a catalyst for the growth of the global landfill gas market, fostering investments in technology and infrastructure to harness the potential of landfill gas as a renewable energy source.

Economic Incentives and Government Subsidies

Economic incentives and government subsidies play a crucial role in promoting the development of the global landfill gas market. Recognizing the environmental and economic benefits of landfill gas-to-energy projects, governments around the world are providing financial support to encourage investments in this sector. Subsidies, tax credits, and feed-in tariffs are being offered to incentivize businesses and municipalities to adopt landfill gas technologies.

Through direct financial support, governments are facilitating easier access to financing and funding for landfill gas projects. Public-private partnerships are being forged to leverage resources and expertise, further accelerating the deployment of landfill gas-to-energy initiatives. These economic incentives not only make landfill gas projects financially viable but also contribute to job creation and economic development in regions where such projects are implemented.

Technological Advancements in Landfill Gas Capture and Utilization

Advancements in technology are driving innovation in landfill gas capture and utilization, enhancing the efficiency and viability of these projects. Traditional methods of landfill gas collection involved passive venting or flaring, which mitigated environmental concerns but did not harness the full energy potential of the gas. However, modern technologies, such as landfill gas extraction systems and advanced gas-to-energy conversion processes, have revolutionized the industry.

Improved gas collection and extraction technologies ensure a higher capture rate of methane, reducing emissions and enhancing environmental sustainability. Concurrently, advancements in gas-to-energy conversion technologies, such as more efficient engines and generators, contribute to increased electricity generation from landfill gas. These technological breakthroughs not only make landfill gas projects more economically attractive but also position them as a reliable and scalable source of renewable energy.

Increasing Energy Demand and Focus on Renewable Resources

The ever-growing global demand for energy, coupled with a heightened focus on renewable resources, is a significant driver propelling the landfill gas market. As conventional energy sources face scrutiny due to environmental concerns and finite

availability, there is a paradigm shift towards cleaner and more sustainable alternatives. Landfill gas, being a renewable resource, aligns with this global shift towards a low-carbon and sustainable energy future.

The increasing energy demand from growing populations and industrialization creates an opportunity for landfill gas to play a vital role in the energy mix. Landfill gas-to-energy projects provide a reliable and continuous source of electricity, contributing to grid stability. With an emphasis on reducing dependence on fossil fuels and decreasing carbon footprints, landfill gas emerges as a viable and environmentally friendly option to meet a portion of the escalating energy demand.

Corporate Sustainability Initiatives and Social Responsibility

Corporate sustainability initiatives and a heightened sense of social responsibility among businesses are driving the adoption of landfill gas projects. Companies across various industries are recognizing the importance of incorporating environmentally sustainable practices into their operations to meet stakeholder expectations and contribute to global sustainability goals. Utilizing landfill gas for energy aligns with these initiatives, providing companies with an opportunity to showcase their commitment to environmental stewardship.

Investing in landfill gas projects allows businesses to diversify their energy sources, reduce carbon emissions, and enhance their overall sustainability profile. Beyond meeting regulatory requirements, corporations are voluntarily integrating landfill gas-to-energy projects into their sustainability strategies, demonstrating a proactive approach to environmental conservation. This trend not only fosters the growth of the global landfill gas market but also encourages a broader adoption of sustainable practices across industries.

The global landfill gas market is being propelled by a confluence of factors, including increasing environmental awareness, stringent regulations, economic incentives, technological advancements, rising energy demand, and corporate sustainability initiatives. These drivers collectively contribute to the transformation of landfill gas from a mere waste byproduct to a valuable and sustainable resource, playing a crucial role in the global transition towards cleaner and more eco-friendly energy solutions.

Government Policies are Likely to Propel the Market

Mandatory Landfill Gas Capture and Utilization Regulations

One of the primary government policies shaping the global landfill gas market is the implementation of mandatory regulations requiring the capture and utilization of landfill gas emissions. Governments worldwide recognize the environmental impact of methane emissions from landfills, a potent greenhouse gas that contributes to climate change. In response, regulatory frameworks have been established to mandate the installation and operation of gas collection systems in landfills.

These regulations typically require landfill operators to deploy advanced gas collection technologies, such as extraction wells and pipes, to capture methane emissions actively. Landfill gas that is captured is then processed and utilized for energy generation, either through electricity production or direct use in industrial applications. By enforcing these policies, governments aim to minimize the release of methane into the atmosphere, mitigate the environmental impact of landfills, and promote the sustainable use of landfill gas as a valuable resource.

The implementation of mandatory capture and utilization regulations not only addresses environmental concerns but also stimulates growth in the landfill gas market. It encourages technological innovation in gas collection systems and promotes the development of infrastructure for converting landfill gas into energy, driving investments in the sector.

Feed-in Tariffs and Renewable Energy Incentives

Governments globally are actively promoting the development of renewable energy sources, and landfill gas has emerged as a key player in this transition. To incentivize the adoption of landfill gas-to-energy projects, many countries have implemented feed-in tariffs and renewable energy incentives.

Feed-in tariffs guarantee a fixed payment rate for the electricity generated from landfill gas, providing investors and project developers with a predictable revenue stream over an extended period. These tariffs make landfill gas projects financially attractive, fostering investment in the sector and encouraging the expansion of landfill gas utilization facilities.

Renewable energy incentives, such as tax credits and subsidies, further enhance the economic viability of landfill gas projects. These incentives reduce the financial barriers associated with project implementation and contribute to the overall competitiveness

of landfill gas as a renewable energy source. By aligning financial incentives with environmental objectives, governments play a pivotal role in shaping the global landfill gas market and promoting sustainable energy solutions.

Carbon Pricing and Emission Trading Systems

In the context of global efforts to combat climate change, governments are increasingly adopting carbon pricing mechanisms and emission trading systems, both of which have significant implications for the landfill gas market. Carbon pricing places a monetary value on greenhouse gas emissions, including methane from landfills, creating a financial incentive for businesses and municipalities to reduce their emissions.

Emission trading systems, often implemented as cap-and-trade programs, allow entities to buy and sell emission allowances. Landfill operators can benefit from participating in these systems by reducing their methane emissions through gas capture projects. By doing so, they can earn emission credits that can be traded or sold to other entities exceeding their emission limits. This economic incentive encourages the implementation of landfill gas capture and utilization projects as a means of reducing overall greenhouse gas emissions.

These government policies not only contribute to environmental sustainability but also position landfill gas as a valuable asset in the carbon market. The financial opportunities associated with emission reductions further drive investments in landfill gas projects, fostering the growth of the global market.

Renewable Portfolio Standards (RPS) and Energy Diversification Targets

Renewable Portfolio Standards (RPS) and energy diversification targets are instrumental policies shaping the global landfill gas market. Governments worldwide are setting ambitious targets to increase the share of renewable energy in their overall energy portfolios, aiming to reduce reliance on fossil fuels and decrease carbon emissions.

Landfill gas, as a renewable and low-carbon energy source, aligns well with these objectives. Governments establish RPS, mandating a specific percentage of electricity generation to come from renewable sources, including landfill gas. Meeting these standards requires the integration of landfill gas projects into the energy mix, driving the development and expansion of infrastructure for capturing and utilizing landfill gas.

Energy diversification targets go hand-in-hand with RPS, encouraging a broad mix of renewable energy sources, including landfill gas, to ensure a resilient and sustainable energy supply. Governments implementing these policies create a favorable environment for investment in landfill gas projects, providing both economic and environmental benefits as the market contributes to achieving national energy goals.

Research and Development Funding for Landfill Gas Technologies

To spur innovation and advancements in landfill gas capture and utilization technologies, governments are increasingly allocating funds for research and development (R&D) initiatives. These programs aim to support the improvement of existing technologies and the exploration of new, more efficient methods for capturing and utilizing landfill gas.

By investing in R&D, governments contribute to the evolution of the landfill gas market, fostering the development of cutting-edge technologies that enhance gas capture rates, improve energy conversion efficiency, and reduce overall environmental impact. Research initiatives may focus on areas such as sensor technologies for monitoring gas emissions, advanced gas-to-energy conversion processes, and innovative approaches to landfill management that minimize gas generation.

Government-funded R&D programs not only stimulate technological innovation but also create opportunities for collaboration between academia, industry, and government agencies. The knowledge and advancements gained through these initiatives contribute to the continued growth and sustainability of the global landfill gas market.

Public-Private Partnerships for Landfill Gas Projects

Public-Private Partnerships (PPPs) are increasingly being leveraged by governments to accelerate the development of landfill gas projects. These partnerships involve collaboration between public entities, such as municipalities or government agencies, and private companies to plan, finance, implement, and operate landfill gas-to-energy initiatives.

By fostering collaboration between the public and private sectors, governments can capitalize on the strengths of both to overcome financial, technical, and operational challenges associated with landfill gas projects. PPPs provide access to private

sector expertise, funding, and project management capabilities while allowing public entities to contribute local knowledge and regulatory support.

These partnerships not only facilitate the development of landfill gas projects but also contribute to job creation, economic development, and the overall advancement of sustainable waste management practices. Governments play a key role in promoting PPPs by creating an enabling regulatory environment, offering financial support, and establishing frameworks that encourage effective collaboration between public and private stakeholders in the landfill gas market.

Key Market Challenges

Infrastructure and Technological Barriers

One of the primary challenges facing the global landfill gas market revolves around infrastructure limitations and technological barriers. While there is a growing recognition of the potential of landfill gas as a renewable energy source, the implementation of effective gas capture and utilization systems requires significant investments in infrastructure and advanced technologies.

Landfill gas collection systems, including wells, pipes, and monitoring equipment, demand robust infrastructure to ensure the efficient extraction of methane emissions from landfills. The establishment of these systems can be hindered by the lack of appropriate landfill design, inadequate funding, or insufficient technical expertise in certain regions. Additionally, older landfills may lack the necessary infrastructure, making retrofitting a complex and costly process.

Technological barriers also impede the widespread adoption of landfill gas projects. While advancements have been made in gas capture and utilization technologies, there is still room for improvement to enhance efficiency, reliability, and cost-effectiveness. The development and deployment of cutting-edge technologies for gas-to-energy conversion require substantial research and development investments. Small-scale or outdated facilities may struggle to incorporate the latest advancements due to financial constraints or limited access to technical expertise.

The geographical distribution of landfills further exacerbates these challenges. Remote or less developed areas may face difficulties in accessing the required infrastructure and expertise, hindering the implementation of landfill gas projects. Addressing these infrastructure and technological barriers necessitates collaborative efforts between

governments, private sector entities, and research institutions ensure the successful deployment of landfill gas solutions on a global scale.

Economic Viability and Financing Constraints

Another significant challenge confronting the global landfill gas market is the economic viability of projects and associated financing constraints. Despite the potential environmental and energy benefits, landfill gas projects often face financial obstacles that hinder their development and expansion.

The economic viability of landfill gas projects is influenced by various factors, including the scale of the project, local energy market conditions, and the cost-effectiveness of gas capture and utilization technologies. Large-scale projects may be more economically feasible due to economies of scale, but their implementation requires substantial upfront investments. On the other hand, smaller projects may struggle to attract investors or secure financing due to perceived risks and uncertainties.

Financing constraints further compound the economic challenges associated with landfill gas projects. Traditional lenders may be hesitant to invest in projects with long payback periods or those perceived as having higher environmental and regulatory risks. Lack of access to affordable financing options can impede the development of landfill gas infrastructure and limit the ability of municipalities or private entities to undertake these projects.

The revenue streams generated from landfill gas projects, such as feed-in tariffs or carbon credits, may not always provide a sufficient return on investment, particularly in regions with lower energy prices or limited policy support. This financial uncertainty hampers the attractiveness of landfill gas projects to potential investors, delaying their implementation and hindering the growth of the global market.

Addressing the economic viability and financing constraints requires a comprehensive approach involving governments, financial institutions, and the private sector. Governments can play a pivotal role by implementing supportive policies, such as offering incentives, grants, or loan guarantees, to make landfill gas projects more financially appealing. Collaboration with international financial institutions and the development of innovative financing mechanisms can further unlock the economic potential of landfill gas projects, facilitating their widespread adoption and contributing to sustainable waste management practices globally.

Key Market Trends

Increasing Adoption of Landfill Gas as a Renewable Energy Source

In recent years, there has been a significant uptick in the adoption of landfill gas (LFG) as a renewable energy source worldwide. Landfill gas, which primarily consists of methane and carbon dioxide, is produced through the decomposition of organic waste materials in landfills. With growing concerns about climate change and the need to transition to cleaner energy sources, LFG has emerged as a viable alternative to traditional fossil fuels.

One key driver behind the increasing adoption of LFG is its potential to mitigate greenhouse gas emissions. Methane, the primary component of LFG, is a potent greenhouse gas with a global warming potential over 25 times greater than carbon dioxide over a 100-year period. By capturing and utilizing LFG as an energy source, landfill operators can prevent methane emissions from escaping into the atmosphere, thereby reducing their environmental footprint.

The growing emphasis on sustainable waste management practices has spurred investments in landfill gas-to-energy (LFGTE) projects. These projects involve the installation of gas collection systems to capture LFG emitted from landfills, which is then processed and used to generate electricity or heat. The electricity generated from LFG can be fed into the grid or used to power onsite facilities, while the heat produced can be utilized for industrial processes or district heating systems.

Favorable government policies and incentives have played a crucial role in driving the adoption of LFG as a renewable energy source. Many countries have implemented renewable energy targets and carbon reduction goals, which incentivize the development of LFGTE projects through feed-in tariffs, tax credits, and renewable energy certificates. Additionally, carbon pricing mechanisms, such as carbon taxes or cap-and-trade systems, have increased the economic viability of LFG projects by placing a price on greenhouse gas emissions.

As a result of these factors, the Global Landfill Gas Market is experiencing steady growth, with an expanding number of landfill operators and energy companies investing in LFGTE projects. Moving forward, the market is expected to continue its upward trajectory as governments, businesses, and communities increasingly prioritize renewable energy solutions to address climate change and achieve sustainability goals.

Segmental Insights

Technology Insights

The Combustion Engine segment held the largest Market share in 2023. Combustion engines, especially reciprocating engines, have a long history of successful use in various applications, including power generation from landfill gas. Their reliability and proven performance make them a trusted choice for converting landfill gas into electricity. Combustion engines are known for their versatility and adaptability to different fuel sources and operating conditions. Landfill gas composition can vary, and combustion engines are capable of efficiently utilizing methane-rich gas with varying characteristics.

Combustion engines come in a range of sizes, making them suitable for both small-scale and large-scale landfill gas-to-energy projects. This scalability allows for flexibility in designing systems based on the specific needs and capacity of a landfill site. Combustion engines are often perceived as cost-effective solutions for landfill gas utilization. The initial capital costs associated with combustion engines and their installation are competitive, contributing to their widespread adoption.

Landfill gas generation can vary based on factors such as waste composition and landfill management practices. Combustion engines are capable of efficiently operating under variable load conditions, adjusting their power output to match the fluctuating availability of landfill gas. The market for combustion engines is well-established, with a mature supply chain for manufacturing, maintenance, and spare parts. This maturity contributes to ease of procurement, ongoing support, and a competitive landscape. Combustion engines can be relatively straightforward to integrate into existing power generation infrastructure. This ease of integration can be advantageous for landfill operators looking to retrofit or upgrade their systems.

Regional Insights

North America held the largest regional market for Global landfill gas market in 2023.

North America has a significant amount of landfill infrastructure, with numerous landfills spread across the continent. These landfills accumulate large volumes of organic waste, which decompose over time and produce landfill gas, primarily methane and carbon dioxide. The extensive landfill infrastructure provides a substantial source of landfill gas

production in North America.

North America has well-established regulations and policies aimed at managing waste and mitigating environmental impacts, including landfill gas emissions. Regulatory agencies such as the Environmental Protection Agency (EPA) in the United States and Environment and Climate Change Canada in Canada enforce regulations to control landfill gas emissions and promote the capture and utilization of landfill gas as a renewable energy source. These regulations create incentives for landfill operators to invest in landfill gas capture and utilization projects.

North American companies have developed advanced technologies and techniques for landfill gas capture, purification, and utilization. These technologies include gas collection systems, landfill gas-to-energy (LFGTE) facilities, gas treatment processes, and power generation systems. The continuous innovation and expertise in landfill gas management enable North American companies to efficiently capture and utilize landfill gas for various applications, including electricity generation, heat production, and vehicle fuel.

There is a growing demand for renewable energy sources in North America, driven by concerns about climate change, air pollution, and energy security. Landfill gas, as a renewable energy source, offers environmental benefits by reducing greenhouse gas emissions and displacing fossil fuels. Additionally, landfill gas projects contribute to local economies by creating jobs and revenue streams for landfill owners and operators.

Governments at the federal, state, and local levels in North America provide incentives and support for landfill gas projects through grants, tax credits, renewable energy credits (RECs), and feed-in tariffs. These incentives help offset the initial capital costs of landfill gas capture and utilization projects and encourage investment in renewable energy infrastructure. Government support for landfill gas projects further promotes North America's dominance in the global landfill gas market.

North American companies often collaborate with government agencies, utilities, technology providers, and project developers to implement landfill gas projects effectively. These collaborations leverage expertise, resources, and funding to overcome technical, regulatory, and financial barriers and accelerate the deployment of landfill gas projects. Collaborative efforts strengthen North America's position as a leader in the global landfill gas market.

Key Market Players

Waste Management Holdings Inc.

Veolia Environnement S.A.

Suez S.A.

Aria Energy LLC

Ameresco Inc.

Energy Developments Pty Ltd

CGN Energy Services Holdings Co. Ltd.

Kohler Co.

ATTERO Recycling Pvt. Ltd.

WIN Waste Innovations Holdings Inc.

Report Scope:

In this report, the Global Landfill Gas Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Landfill Gas Market, By Technology:

Combustion Engine

Turbines

Others

Landfill Gas Market, By Application:

Utility Flares

Pipeline-Quality

Process Heater

Leachate Evaporation

Electricity Generation

Landfill Gas Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Landfill Gas Market.

Available Customizations:

Global Landfill Gas Market report with the given Market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional Market players (up

t%li%five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL LANDFILL GAS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Technology (Combustion Engine, Turbines, Others)
 - 5.2.2. By Application (Utility Flares, Pipeline-Quality, Process Heater, Leachate Evaporation, Electricity Generation)
 - 5.2.3. By Region

- 5.2.4. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA LANDFILL GAS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Technology
 - 6.2.2. By Application
 - 6.2.3. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Landfill Gas Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Technology
 - 6.3.1.2.2. By Application
 - 6.3.2. Canada Landfill Gas Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Technology
 - 6.3.2.2.2. By Application
 - 6.3.3. Mexico Landfill Gas Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Technology
 - 6.3.3.2.2. By Application

7. EUROPE LANDFILL GAS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Technology
 - 7.2.2. By Application
 - 7.2.3. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Landfill Gas Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Technology

7.3.1.2.2. By Application

7.3.2. United Kingdom Landfill Gas Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Technology

7.3.2.2.2. By Application

7.3.3. Italy Landfill Gas Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Technology

7.3.3.2.2. By Application

7.3.4. France Landfill Gas Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Technology

7.3.4.2.2. By Application

7.3.5. Spain Landfill Gas Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Technology

7.3.5.2.2. By Application

8. ASIA-PACIFIC LANDFILL GAS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Technology

8.2.2. By Application

8.2.3. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Landfill Gas Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Technology

8.3.1.2.2. By Application

8.3.2. India Landfill Gas Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Technology

8.3.2.2.2. By Application

8.3.3. Japan Landfill Gas Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Technology

8.3.3.2.2. By Application

8.3.4. South Korea Landfill Gas Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Technology

8.3.4.2.2. By Application

8.3.5. Australia Landfill Gas Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Technology

8.3.5.2.2. By Application

9. SOUTH AMERICA LANDFILL GAS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Technology

- 9.2.2. By Application
- 9.2.3. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Landfill Gas Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Technology
 - 9.3.1.2.2. By Application
 - 9.3.2. Argentina Landfill Gas Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Technology
 - 9.3.2.2.2. By Application
 - 9.3.3. Colombia Landfill Gas Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Technology
 - 9.3.3.2.2. By Application

10. MIDDLE EAST AND AFRICA LANDFILL GAS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Technology
 - 10.2.2. By Application
 - 10.2.3. By Country
- 10.3. Middle East and Africa: Country Analysis
 - 10.3.1. South Africa Landfill Gas Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Technology
 - 10.3.1.2.2. By Application
 - 10.3.2. Saudi Arabia Landfill Gas Market Outlook
 - 10.3.2.1. Market Size & Forecast

- 10.3.2.1.1. By Value
- 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Technology
 - 10.3.2.2.2. By Application
- 10.3.3. UAE Landfill Gas Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Technology
 - 10.3.3.2.2. By Application
- 10.3.4. Kuwait Landfill Gas Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Technology
 - 10.3.4.2.2. By Application
- 10.3.5. Turkey Landfill Gas Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Technology
 - 10.3.5.2.2. By Application

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

- 13.1. Waste Management Holdings Inc.
 - 13.1.1. Business Overview
 - 13.1.2. Key Revenue and Financials
 - 13.1.3. Recent Developments
 - 13.1.4. Key Personnel/Key Contact Person
 - 13.1.5. Key Product/Services Offered
- 13.2. Veolia Environnement S.A.

- 13.2.1. Business Overview
- 13.2.2. Key Revenue and Financials
- 13.2.3. Recent Developments
- 13.2.4. Key Personnel/Key Contact Person
- 13.2.5. Key Product/Services Offered
- 13.3. Suez S.A.
 - 13.3.1. Business Overview
 - 13.3.2. Key Revenue and Financials
 - 13.3.3. Recent Developments
 - 13.3.4. Key Personnel/Key Contact Person
 - 13.3.5. Key Product/Services Offered
- 13.4. Aria Energy LLC
 - 13.4.1. Business Overview
 - 13.4.2. Key Revenue and Financials
 - 13.4.3. Recent Developments
 - 13.4.4. Key Personnel/Key Contact Person
 - 13.4.5. Key Product/Services Offered
- 13.5. Ameresco Inc.
 - 13.5.1. Business Overview
 - 13.5.2. Key Revenue and Financials
 - 13.5.3. Recent Developments
 - 13.5.4. Key Personnel/Key Contact Person
 - 13.5.5. Key Product/Services Offered
- 13.6. Energy Developments Pty Ltd
 - 13.6.1. Business Overview
 - 13.6.2. Key Revenue and Financials
 - 13.6.3. Recent Developments
 - 13.6.4. Key Personnel/Key Contact Person
 - 13.6.5. Key Product/Services Offered
- 13.7. CGN Energy Services Holdings Co. Ltd.
 - 13.7.1. Business Overview
 - 13.7.2. Key Revenue and Financials
 - 13.7.3. Recent Developments
 - 13.7.4. Key Personnel/Key Contact Person
 - 13.7.5. Key Product/Services Offered
- 13.8. Kohler Co.
 - 13.8.1. Business Overview
 - 13.8.2. Key Revenue and Financials
 - 13.8.3. Recent Developments

13.8.4. Key Personnel/Key Contact Person

13.8.5. Key Product/Services Offered

13.9. ATTERO Recycling Pvt Ltd

13.9.1. Business Overview

13.9.2. Key Revenue and Financials

13.9.3. Recent Developments

13.9.4. Key Personnel/Key Contact Person

13.9.5. Key Product/Services Offered

13.10. WIN Waste Innovations Holdings Inc.

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

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