

LNG Carrier Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Containment Type (Moss Type and Membrane Type), By Storage Capacity (Under 120,000 cubic meter, 120,000-160,000 cubic meter and Above 160,000 cubic meter), By Propulsion Type (Steam Turbines, Dual Fuel Diesel Engine/Tri-Fuel Diesel Engine (DFDE/TFDE), Slow-Speed Diesel (SSD), M-type Electronically Controlled Gas Injection (ME-GI), XDF- Two Stroke Engine and Steam Re-heat and Stage), By End User Industry (Transport, Defense and Others), By Region, By Competition

<https://marketpublishers.com/r/LE8D705E08D6EN.html>

Date: October 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: LE8D705E08D6EN

Abstracts

Global LNG Carrier Market has valued at USD 10.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.19% through 2028.

The LNG Carrier Market refers to the global industry involved in the transportation of liquefied natural gas (LNG) from production and liquefaction facilities to distribution terminals and end-users. LNG is a vital component of the global energy trade, and specialized vessels known as LNG carriers play a pivotal role in facilitating the safe and efficient movement of LNG across the seas. These carriers are equipped with advanced cryogenic technologies to transport natural gas in its liquefied form, which is achieved by cooling it to extremely low temperatures, making it more compact for shipping. The LNG Carrier Market encompasses various aspects, including the design, construction,

operation, and maintenance of these vessels. Key stakeholders in the market include LNG producers, terminal operators, shipping companies, and governments. Market dynamics are influenced by factors such as shifts in global energy demand, changes in environmental regulations, economic trends, and geopolitical developments. The market continuously evolves with innovations in vessel design, propulsion systems, safety measures, and environmental performance to meet the growing demand for LNG and address environmental concerns.

In summary, the LNG Carrier Market is a crucial component of the global energy landscape, facilitating the reliable and efficient transport of LNG to support diverse energy needs worldwide.

Key Market Drivers

Increasing LNG Demand and Production:

The global LNG Carrier market is being driven by the rising demand for liquefied natural gas (LNG) and the concurrent increase in LNG production. Natural gas, considered a cleaner alternative to coal and oil, is in high demand due to its lower carbon emissions and versatility. As countries aim to reduce their carbon footprints and transition towards more sustainable energy sources, the demand for LNG has surged. LNG carriers play a critical role in transporting this valuable energy resource from exporting countries to importing regions. One of the primary reasons for the growth in LNG production is the abundance of natural gas reserves worldwide. Countries with substantial natural gas reserves have been investing heavily in LNG production facilities, which, in turn, fuels the demand for LNG carriers. These carriers are specially designed to store and transport LNG at extremely low temperatures and high pressures, ensuring the safe and efficient delivery of LNG to its destination.

Expanding LNG Infrastructure:

The expansion of LNG infrastructure is a significant driver of the global LNG Carrier market. LNG infrastructure includes liquefaction plants, regasification terminals, storage facilities, and pipelines. As more countries invest in building or expanding their LNG infrastructure, there is a growing need for LNG carriers to transport LNG between these facilities and international markets. Many nations are actively seeking to diversify their energy sources by investing in LNG terminals and terminals that can handle both LNG and natural gas. This diversification strategy enhances energy security and reliability. Consequently, it boosts the demand for LNG carriers as they facilitate the movement of

LNG within and between these facilities.

Environmental Concerns and LNG's Role:

Environmental concerns, including the need to reduce greenhouse gas emissions and combat climate change, have led to a global shift towards cleaner energy sources. LNG is viewed as a bridge fuel that can help reduce carbon emissions compared to more carbon-intensive fossil fuels like coal and oil. The environmental benefits of LNG make it an attractive choice for both developed and emerging economies. LNG carriers enable the transportation of LNG to meet the growing energy demands of these markets while adhering to environmental goals.

Economic Growth and Industrialization:

The global LNG Carrier market is influenced by economic growth and industrialization, particularly in emerging markets. As countries experience rapid industrialization and urbanization, their energy consumption increases significantly. LNG carriers play a vital role in supplying natural gas, which is used for electricity generation, industrial processes, and heating.

Asia, in particular, has witnessed substantial economic growth, with countries like China and India leading the way. These nations have a growing appetite for LNG to fuel their expanding economies and meet the energy needs of their growing populations. This economic growth is a major driver of the LNG Carrier market, as it translates into higher demand for LNG transport services.

Technological Advancements in LNG Carrier Design:

Advancements in technology have led to the development of more efficient and environmentally friendly LNG carriers. These innovations include improved ship designs, propulsion systems, and safety features. The adoption of advanced materials and engineering solutions has enhanced the competitiveness of LNG carriers in the global energy transport market. Modern LNG carriers are designed to be more energy-efficient, reducing fuel consumption and emissions. Additionally, safety measures have been enhanced to ensure the secure transportation of LNG, minimizing the risk of accidents and environmental incidents. These technological advancements not only make LNG carriers more attractive to operators but also contribute to the overall growth of the market.

Global Energy Security Considerations:

Energy security is a critical concern for many countries, and diversifying the sources of natural gas supply is a strategic approach to enhancing it. LNG carriers play a pivotal role in this strategy by facilitating the transportation of LNG from various regions. By reducing dependence on a single energy source or supplier, countries can enhance their energy security and resilience.

In conclusion, the global LNG Carrier market is driven by the growing demand for LNG, expanding LNG infrastructure, environmental considerations, economic growth and industrialization, technological advancements, and global energy security concerns. These drivers collectively contribute to the continued growth and vitality of the LNG Carrier industry on a global scale.

Government Policies are Likely to Propel the Market

Environmental Regulations and Emission Standards:

Government policies around the world are increasingly focused on environmental protection and reducing greenhouse gas emissions. In the context of the LNG Carrier Market, these policies have a significant impact on vessel design, operation, and emissions. Many governments have implemented stringent regulations and emission standards for maritime transportation, including LNG carriers. These standards often require the use of cleaner fuels, such as low-sulfur fuels, and the adoption of advanced emission control technologies like exhaust gas cleaning systems (scrubbers). Governments also encourage the adoption of LNG as a marine fuel due to its lower carbon and sulfur content compared to traditional marine fuels. Incentives, subsidies, and regulations promoting LNG as a maritime fuel can influence the demand for LNG carriers equipped to transport LNG as cargo and potentially use it as fuel for propulsion.

Energy Security Policies:

Energy security is a top priority for many governments, and policies related to ensuring a stable energy supply can impact the LNG Carrier Market. Some countries have developed strategic plans to diversify their energy sources and supply routes to reduce dependence on a single supplier or energy source. LNG carriers play a crucial role in these strategies by enabling the importation of LNG from various regions. Governments may incentivize the construction and operation of LNG terminals and associated infrastructure, as well as LNG carriers, to enhance energy security. These policies often

involve agreements and partnerships with LNG-exporting countries to secure a stable supply of LNG.

Trade and Tariff Policies:

Government policies related to international trade and tariffs can influence the global LNG Carrier Market. Trade agreements, import/export tariffs, and trade barriers impact the flow of LNG and, consequently, the demand for LNG carriers. Free trade agreements and preferential trade terms for LNG can stimulate the LNG Carrier Market by facilitating the movement of LNG between countries. Conversely, trade restrictions or tariffs on LNG can hinder the market's growth by making LNG less competitive in certain markets.

Safety and Security Regulations:

Safety and security regulations imposed by governments have a substantial impact on LNG carriers' operation and design. LNG is a cryogenic liquid, and its transportation requires specialized safety measures. Governments often enact strict regulations regarding LNG carrier construction, operation, and emergency response procedures to mitigate risks associated with LNG transportation. These regulations encompass aspects such as hull design, containment systems, emergency shutdown systems, and crew training. Compliance with safety and security regulations is essential for obtaining the necessary permits and approvals for LNG carrier operations.

Infrastructure Development Policies:

The development of LNG infrastructure, including liquefaction plants, regasification terminals, and storage facilities, is often influenced by government policies and incentives. Governments may provide financial incentives, tax breaks, or regulatory support to encourage private sector investment in LNG infrastructure. These policies are instrumental in expanding the LNG supply chain and, consequently, the demand for LNG carriers. A well-developed infrastructure network ensures a consistent supply of LNG and efficient distribution, driving the need for LNG carriers to transport LNG between terminals and international markets.

Environmental and Energy Transition Policies:

In line with global efforts to combat climate change and reduce greenhouse gas emissions, many governments are implementing policies that promote the use of

cleaner fuels and technologies, including LNG. These policies often include emissions reduction targets, carbon pricing mechanisms, and renewable energy incentives. Governments may encourage the adoption of LNG as a transitional fuel in the shipping industry to meet stricter emissions targets. This can influence shipowners' decisions to invest in LNG carriers and retrofit existing vessels to run on LNG. Additionally, incentives to develop and adopt cleaner propulsion technologies for LNG carriers, such as LNG-electric or LNG-hydrogen hybrid systems, can be part of these policies.

In conclusion, government policies significantly impact the global LNG Carrier Market. Policies related to environmental regulations, energy security, trade, safety, infrastructure development, and the energy transition all play a pivotal role in shaping the demand for LNG carriers and the overall dynamics of the industry.

Key Market Challenges

Volatility in LNG Demand and Supply:

The global LNG Carrier Market faces a persistent challenge driven by the inherent volatility in both LNG demand and supply. This volatility is a result of various factors, including geopolitical tensions, economic fluctuations, and changes in energy policies across countries.

Demand Volatility:

The demand for LNG can be highly sensitive to factors such as weather patterns, economic growth, and energy policies. For instance, a particularly cold winter in a major importing region can lead to a sudden surge in LNG demand for heating purposes. Conversely, a mild winter can result in reduced demand. Economic downturns can also impact industrial energy consumption, affecting LNG demand.

Moreover, changes in energy policies, such as increased emphasis on renewable energy sources or shifts in energy generation methods, can influence the demand for LNG. Government policies to incentivize or mandate the use of renewables, for example, can reduce LNG demand, making it challenging for carriers to predict and respond to market shifts effectively.

Supply Volatility:

The supply side of the LNG market is equally subject to volatility. The development of

LNG projects, particularly liquefaction terminals, is capital-intensive and time-consuming. Delays in project approvals, construction, or commissioning can disrupt supply timelines. Additionally, unexpected technical issues or natural disasters can impact LNG production and export capabilities.

Geopolitical factors also contribute to supply volatility. Disputes among LNG-producing countries or regions can lead to disruptions in LNG supply chains. For example, tensions in the Middle East or the South China Sea have the potential to affect LNG production and shipping routes, affecting the reliability of supply for LNG carriers.

Navigating these demand and supply fluctuations is challenging for LNG carriers and can lead to underutilization of vessels or the need for expensive repositioning. Carriers must develop flexible strategies to adapt to changing market conditions, such as entering into shorter-term charter agreements or diversifying their customer base.

Capital Intensity and Technological Advancements:

Another significant challenge facing the global LNG Carrier Market is the capital intensity of LNG carrier construction and the rapid pace of technological advancements in the industry.

Capital Intensity:

Building and operating LNG carriers is a capital-intensive endeavor. LNG carriers are specialized vessels with complex infrastructure, including cryogenic tanks and sophisticated containment systems to transport LNG safely at extremely low temperatures and high pressures. The cost of constructing and maintaining these vessels is substantial, and owners and operators often require substantial financial resources.

Furthermore, the industry trend toward larger and more advanced LNG carriers has increased construction costs. These larger vessels offer economies of scale, but they also require substantial upfront investments. Securing financing for LNG carrier projects can be challenging, particularly for smaller operators or new entrants to the market.

Technological Advancements:

The LNG Carrier Market is characterized by rapid technological advancements aimed at improving vessel efficiency, safety, and environmental performance. While these

advancements are positive in terms of reducing emissions and enhancing vessel capabilities, they also present challenges.

Owners and operators must continuously invest in retrofitting or upgrading existing fleets to remain competitive and comply with evolving environmental regulations. Keeping pace with these technological advancements can strain budgets and require significant planning and investment.

Additionally, the introduction of new propulsion technologies, such as LNG-electric or LNG-hydrogen hybrid systems, necessitates substantial capital expenditures and presents operational challenges related to crew training and maintenance.

In conclusion, the global LNG Carrier Market faces challenges related to demand and supply volatility, as well as the capital intensity of vessel construction and rapid technological advancements. These challenges require carriers to adopt flexible strategies, secure adequate financing, and continually invest in their fleets to remain competitive in an evolving industry.

Segmental Insights

Moss Type Insights

The Moss Type segment had the largest market share in 2022 & expected to maintain it in the forecast period. Moss Type containment systems have been in use for several decades and have demonstrated their reliability and safety. This long and successful track record instills confidence among LNG carriers' operators, shipbuilders, and investors. Many LNG carriers equipped with Moss Type containment systems have operated safely and effectively, contributing to their continued use.

Flexibility for Smaller Vessels: Moss Type tanks are well-suited for smaller LNG carriers. They can be adapted to fit various vessel sizes and configurations, making them a versatile choice for a range of LNG transport needs. This adaptability is valuable in meeting diverse market demands.

Robust Design: Moss Type tanks have a robust design with spherical storage tanks that can withstand the harsh marine environment. The spherical shape evenly distributes the stress, enhancing structural integrity and safety. This design feature is particularly beneficial for LNG carriers operating in challenging conditions, such as in rough seas or extreme weather. Moss Type tanks provide effective thermal insulation, which helps reduce boil-off gas rates during LNG transport. This efficiency is essential for minimizing LNG losses and maximizing cargo delivery. Moss Type tanks are relatively easier to access for maintenance and repairs compared to some other

containment systems. This ease of maintenance can reduce downtime and operational disruptions, contributing to cost savings and reliability. LNG carriers are substantial investments, and operators often prioritize proven technologies with a strong reputation for safety and performance. Moss Type containment systems have earned the trust of many industry stakeholders, including LNG producers, terminal operators, and investors. For certain vessel sizes and applications, Moss Type containment systems may be cost-effective compared to alternative systems. The initial construction and operational costs are factors that influence the choice of containment system, and Moss Type can be competitive in this regard.

120,000-160,000 cubic meter Insights

The 120,000-160,000 cubic meter segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. LNG carriers in the 120,000-160,000 cubic meter range are versatile and well-suited to a wide variety of LNG trade routes and terminal configurations. They can efficiently serve both large-scale LNG terminals and smaller, more remote terminals, offering a high degree of flexibility in meeting diverse market demands. These carriers strike a balance between cargo capacity and operational efficiency. They are large enough to achieve economies of scale in terms of construction costs and operational costs per unit of LNG transported. At the same time, they are not as size-restricted as smaller carriers, allowing them to carry substantial LNG volumes. LNG terminals worldwide have varying depth restrictions and infrastructure capabilities. LNG carriers in the 120,000-160,000 cubic meter range are typically designed to meet these limitations, making them capable of accessing a broad range of terminals without significant constraints. These carriers offer cost-effective transportation for LNG projects with moderate volumes. They strike a balance between the higher transportation costs associated with smaller carriers and the potentially excessive costs of very large carriers. This makes them attractive for LNG producers and consumers looking to optimize their transportation expenses. Many LNG terminals, particularly those built in the past, were designed to accommodate LNG carriers in the 120,000-160,000 cubic meter range. This compatibility reduces the need for extensive modifications to existing terminals and enhances the efficiency of LNG trade operations. Historically, the majority of LNG projects and trade routes have been well-suited to carriers in this size range. Market demand, trade patterns, and the availability of projects often influence the choice of carrier capacity.

Regional Insights

Asia Pacific:

The Asia Pacific region was the largest market for LNG carriers in 2022. This is due to the growing demand for LNG in China and other countries in the region. China is the largest importer of LNG in the world, and it is expected to continue to grow its LNG imports in the coming years. Other major markets in the region include Japan, South Korea, India, and Indonesia.

Europe:

Europe was the second-largest market for LNG carriers in 2022. The demand for LNG in Europe is growing, driven by the need to reduce reliance on imported oil and gas. The United Kingdom is the largest importer of LNG in Europe, followed by France and Spain.

North America:

North America was the third-largest market for LNG carriers in 2022. The demand for LNG in North America is growing, driven by the development of new LNG export terminals in the United States and Canada. The United States is the largest exporter of LNG in the world, and it is expected to continue to grow its LNG exports in the coming years.

Key Market Players

BW Group

China Merchants Heavy Industry

Daewoo Shipbuilding & Marine Engineering

Excelerate Energy

GasLog Partners LP

Hyundai Heavy Industries Co. Ltd

K Line LNG Shipping Ltd

Mitsui O.S.K. Lines Ltd

Qatar Gas Transport Company Limited

New Fortress Energy Inc

Report Scope:

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

LNG Carrier Market, By Containment Type:

Moss Type

Membrane Type

LNG Carrier Market, By Storage Capacity:

Under 120,000 cubic meter,

120,000-160,000 cubic meter

Above 160,000 cubic meter

LNG Carrier Market, By Propulsion Type:

Steam Turbines,

Dual Fuel Diesel Engine/Tri-Fuel Diesel Engine (DFDE/TFDE),

Slow-Speed Diesel (SSD),

M-type Electronically Controlled Gas Injection (ME-GI),

XDF- Two Stroke Engine

Steam Re-heat and Stage

LNG Carrier Market, By End User Industry:

Transport,

Defense

Others

LNG Carrier 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 LNG Carrier Market.

Available Customizations:

Global LNG Carrier 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 to five).

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