Global Small Scale LNG Market Research Report: Information by Type (Liquefaction Terminal, Regasification Terminal), Mode of Supply, Application (Utilities, Residential, Industrial, Commercial, Marine, Transportation), and Region - Forecast till 2023

Market Scenario

Natural gas is a clean source fossil fuel with lowest emission of pollutants. The energy sector is facing issues owing to strict regulations against climate change, widening supply and demand gap, rising concern relating to cleaner and sustainable source of energy, and depleting fossil resources. Natural gas is sustainable energy source. However, the source faces storage issues as the volume of natural gas is high. To solve this problem, natural gas is converted to liquid form at liquefaction terminals, for ease of transportation. At the destination of end use, the liquefied gas is again converted to gas at regasification terminals. Globally, the number of liquefaction & regasification terminals are increasing, given the increasing demand for energy fuel.

Liquefied natural gas (LNG) is natural gas in its, liquid form. The gas is cooled at -160°C to convert it into an odorless, colorless liquid, that can be again re-gasified at end use destination. The typical value chain for the LNG includes gas production & transmission, treatment & liquefaction plant, storage, LNG shipping in ballasts, receiving terminals, regasification, and then to end user. The major demand for LNG comes from power plants, fertilizer industry, and transportation fueling, cooking and heating for industrial, commercial & residential sector. In recent scenario, the smaller scale LNG projects have boosted up with increasing demand for LNG and emerging markets as net importers and exporters. According to Shell’s LNG outlook, global gas demand growth by sectors including power, transport, and others, expanded at 2% CAGR, in 2017.

Small-scale LNG are altogether the LNG transportation from liquefaction terminal to regasification terminals through tankers, ship, and trucks. The need for small-scale LNG arises from increasing demand for LNG, increasing number for lesser capacity liquefaction terminals, and simpler storage facilities. These terminals have maximum capacity of 0.5 MMTPA. For instance, in Singapore the small-scale LNG terminal has capacity of only 11 MTPA. By the end of 2017, China had 4 small-scale LNG terminals, which can meet the demand of natural gas for small-scale projects. The advantage of small-scale LNG are adjustable annual delivery contracts, and minimum counterparty risks. Global small-scale LNG market has been segmented on the basis of mode of supply, type, application, and region. Based on type, the market is further segmented into liquefaction and regasification terminals. Liquefaction terminal segments holds larger market share due to increasing natural gas storage infrastructure. On the basis of mode of supply, global small-scale LNG market is classified as Trucks, Trans-shipment and Bunkering, Captive Consumption through Pipeline & Rail. The trans-shipment and Bunkering market is prominent in the market due to booming shipping industry. Based on applications, the market is segmented as utilities, residential, industrial & commercial, marine, and transportation.

Small-scale LNG market is expected to have huge number of advancements over the forecast period owing to Liquefaction providers offering plug-and-play concepts with a reduced price tag, operating cost, and deployment time. The market is also expected to have high expansion activities by multinationals and well-established companies.

The global small-scale LNG market is expected to expand at ~2.5% CAGR during the forecast period.

Market Segmentation
Global Small Scale LNG Market

Global Small Scale LNG market is expected to witness phenomenal growth during the forecast period. The market is expected to grow in Asia Pacific region and Africa region due to increasing demand for natural gas as fuel for power and automobile industry. Besides, the regions are experiencing surge in projects of liquefaction and regasification terminal. For instance, Japan and South Korea are increasing their liquefaction capacity, thus, driving the market. Egypt has emerged as new importer for LNG while Mozambique has discovered a new gas field, which will make the nation a huge gas exporter. Europe region is likely to follow the small-scale LNG market after Asia Pacific and Africa regions. According to European Union policies, the nations are phasing out coal-based power plants, thus creating surge in demand for LNG.

Key Players

The key players of global small-scale LNG market are Gazprom (Russia), Engie SA (France), Honeywell International Inc. (U.S.), Wärtsilä Corporation (Finland), and The Linde Group (Germany). Skangas AS (Norway), IHI Corporation (Japan), Excelerate Energy L.P (U.S), Prometheus Energy (U.S), Cryostar (U.S.), GE Oil & Gas (U.S.), and Novatek (Russia), are among others.
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