

# **Sulphur Recovery Market By Technology (Claus Process, Claus Tail Gas Treatment (TGT) , Others) , By Feedstock (Crude Oil, Natural Gas, Coal, Biomass, Others) By End-Use Industry (Oil and Gas, Chemical Industry, Mining, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033**

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## **Abstracts**

### **Sulphur Recovery Market**

The sulphur recovery market was valued at \$2.6 billion in 2023 and is projected to reach \$4.8 billion by 2033, growing at a CAGR of 6.3% from 2024 to 2033.

Sulfur recovery is the process of capturing and converting hydrogen sulfide (H<sub>2</sub>S) into elemental sulfur. H<sub>2</sub>S is commonly present in natural gas, crude oil, and several industrial processes. Sulfur recovery is a critical process for environmental protection, as the capture of H<sub>2</sub>S inhibits sulfur emissions, which are a major cause of air pollution and acid rain. Sulfur recovery units are essentially deployed in gas processing plants and refineries to ensure compliance with environmental regulations.

The global rise in demand for energy has boosted the need for oil & gas production, hence surging the installation of sulphur recovery units. In addition, the sulphur recovered from the process holds several economic benefits, thereby encouraging industries to deploy the recovery systems and driving the growth of the market. In recent times, the prediction and optimization of sulphur recovery units using machine learning is acquiring traction. This is a significant move toward the integration of Industry 4.0 into industrial processes.

However, the profitability of the recovery process is subject to volatility in sulphur prices, thereby hampering the development of the market. Furthermore, fluctuations in crude oil prices due to geopolitical factors lead to scaling back of non-essential projects, including upgrading sulfur recovery units, thereby posing challenges to the growth of the market. As per Reuters, an international news agency, the rates of crude oil declined by over 10% in 2023 owing to geopolitical instability and uncertainties regarding the production levels of the leading oil producers across the globe.

## Segment Review

The sulphur recovery market is segmented into technology, feedstock, application, end-use industry, and region. On the basis of technology, the market is divided into claus process, claus tail gas treatment (TGT), and others. As per feedstock, it is classified into crude oil, natural gas, coal, biomass, and others. According to application, it is segmented into refineries, gas processing plants, petrochemical plants, and others. Depending on end-use industry, it is categorized into oil & gas, chemical industry, mining, and others. Region wise, it is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

## Key Findings

On the basis of technology, the claus process segment is expected to hold a high market share throughout the forecast period.

As per feedstock, the crude oil segment is anticipated to dominate during the forecast period.

According to application, the refineries segment is predicted to acquire high stakes during the forecast period.

Depending on end-use industry, the oil & gas segment is expected to be the highest shareholder by 2033.

Region wise, Asia-Pacific is projected to be the revenue generator by 2033.

## Competition Analysis

The major players operating in the global sulphur recovery market include Jacobs,

Chiyoda Corporation, John Wood Group PLC, TechnipFMC plc, Worley Parsons, Linde plc, Fluor Corporation, KT-Kinetics Technology SpA, Bechtel Corporation, and Honeywell International Inc. These players have adopted various key developmental strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the market.

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End user preferences and pain points

Investment Opportunities

Product Benchmarking / Product specification and applications

Upcoming/New Entrant by Regions

Technology Trend Analysis

Market share analysis of players by products/segments

New Product Development/ Product Matrix of Key Players

Patient/epidemiology data at country, region, global level

Additional company profiles with specific client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

Market share analysis of players at global/region/country level

SWOT Analysis

Key Market Segments

By Technology

Claus Process

Claus Tail Gas Treatment (TGT)

Others

## By Feedstock

Crude Oil

Natural Gas

Coal

Biomass

Others

## By End-Use Industry

Oil and Gas

Chemical Industry

Mining

Others

## By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Jacobs

Chiyoda Corporation

John Wood Group PLC

TechnipFMC plc

Worley Parsons

Linde plc

Fluor Corporation

KT-Kinetics Technology SpA

Bechtel Corporation

Honeywell International Inc.

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