

Global Refinery Process Chemical Market Size Study, by Product Type (Catalysts, pH Adjustors, Anti-Fouling Agents, Corrosion Inhibitors), by Refinery Process Conversion Type (Water Treatment, Petroleum Treatment), by End-User (Oil and Gas, Chemical, Water Treatment) and Regional Forecasts 2022-2032

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Abstracts

The Global Refinery Process Chemical Market is valued at approximately USD 5.69 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 5.2% over the forecast period 2024-2032. Refinery Process Chemicals are essential components in the complex operations of oil refineries. These chemicals facilitate various refining processes, including desalting, distillation, cracking, and treating. For example, corrosion inhibitors are used to protect equipment from the harsh conditions of refining, while anti-fouling agents help prevent the buildup of deposits that can impair efficiency. Demulsifiers are employed to separate water from crude oil, ensuring smooth downstream processing. Additionally, catalysts are critical for processes like catalytic cracking and hydrocracking, where they speed up chemical reactions to break down large hydrocarbon molecules into smaller, more valuable ones.

The growing need to reduce carbon emissions has prompted refineries to invest in carbon capture systems. The integration of digital technology, including artificial intelligence (AI), machine learning (ML), and advanced analytics, is revolutionizing the refining business. Additionally, the circular economy's emphasis on reducing, recycling, and reusing waste is gaining traction within the industry. Leveraging nanotechnology, novel materials and catalysts for refining processes are being developed. Companies involved in the development of refinery equipment are increasingly turning to 3D printing

and additive manufacturing. Incorporating digital technology and Industry 4.0 is paving the way for the supply of data-driven and intelligent chemicals for refinery processes. Furthermore, there is a significant opportunity for manufacturers to develop refinery specialty chemicals that facilitate the synthesis, storage, and utilization of hydrogen in refining processes due to the increased interest in hydrogen as a clean energy source.

However, the market faces challenges such as the high cost of raw materials and stringent environmental regulations related to the recyclability and sustainability of materials used in refinery processes. Companies may need to make additional investments to ensure compliance with these regulations or develop novel formulations that fit the regulatory requirements. The shift towards alternative energy sources, including electric vehicles (EVs) and renewable energy, poses a threat to the existing oil and gas industry, potentially impacting the refinery product sector negatively. Nevertheless, advancements in materials science, particularly nanotechnology, are expected to facilitate the synthesis of sophisticated downstream chemicals and drive market growth.

The key regions considered for the Global Refinery Process Chemical Market study include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. In year 2023, North America holds the dominating position in the market. In the region, the shale gas revolution supports the growth of the refinery process chemical market, providing refineries access to reasonably priced feedstock. The Asia Pacific region is projected to registered fastest growth which is driven by countries such as China and India, are focusing on increasing refining capacity to meet the rising demand for petrochemicals and fuel.

Major market players included in this report are:

The Dow Chemical Company

Chevron Phillips Chemical Company LLC

Exxon Mobil Corporation

Royal Dutch Shell PLC

SABIC (Saudi Basic Industries Corporation)

Clariant AG

Evonik Industries AG

Honeywell International Inc.

Albemarle Corporation

Johnson Matthey

W.R. Grace & Co.

Arkema S.A.

DuPont de Nemours, Inc.

Haldor Topsoe A/S

LyondellBasell Industries N.V.

The detailed segments and sub-segment of the market are explained below:

By Product Type:

Catalysts

pH Adjustors

Anti-Fouling Agents

Corrosion Inhibitors

By Refinery Process Conversion Type:

Water Treatment

Petroleum Treatment

By End-User:

Oil and Gas

Chemical

Water Treatment

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

RoMEA

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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