

Global Gas Treatment Chemicals Market Outlook to 2027

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Abstracts

Gas treatment chemicals are the chemical formulations that are used to treat contaminants comprising organic compounds containing sulfur, carbon, nitrogen, and oxygen, dissolved metals, and inorganic salts present in natural gas, synthesis gas, and biogas. According to BlueQuark Research & Consulting, the global Gas treatment chemicals market is expected to witness a moderate growth rate during the forecasted period. The global market for gas treatment chemicals is being driven by the increasing production and consumption of natural gas in the Asia-Pacific region and the environmental benefits offered by the application of gas treatment chemicals. However, the availability of substitute products and services is likely to hinder the growth of the market.

The Asia-Pacific region has the presence of several countries at different stages of economic development, including developed countries, developing countries, and newly industrializing economies (NIEs). Natural gas has proved to be one of the most prominent energy sources in the region. In 2019, the major countries in the region that led the production of natural gas included China, Australia, Malaysia, Indonesia, and Thailand, among others. China tops the other countries in the region with the maximum proven natural gas resources. The country has 49,45,000 million cubic meters of natural gas, claiming the tenth position globally. Currently, there is a high reliance on coal (leading contributor to air pollution) for energy production in the region; however, the share of natural gas is increasing at a considerable rate. Asian countries are expected to invest more in the natural gas infrastructure in the coming years, thus continue to drive the consumption of gas treatment chemicals in the region. However, in the short term, the demand is likely to keep outpacing the supply in the region.

The growth in the consumption of natural gas in the Asia-Pacific region is driven by

increased economic activities arising from higher levels of consumer demand and industrial output. In China, the consumption of natural gas is likely to be driven by the increased demand for natural gas in truck and rail freight transport. According to EIA, natural gas consumption in China's transportation sector is anticipated to grow from less than one quadrillion Btu in 2018 to nearly six quadrillions Btu in 2050. In India, natural gas consumption is being driven by the increasing production of goods. According to the International Energy Outlook 2019 report, the use of natural gas in the industrial sector of India is expected to reach six quadrillions Btu by 2050. The other major countries in the region that are expected to witness a high surge in natural gas demand include Bangladesh, Thailand, and Vietnam, among others. This trend of increasing consumption and production of natural gas in the region is likely to continue to drive the consumption of gas treatment chemicals in the coming years.

The Oil Ministry of Iran is considering the global shift toward natural gas and the significant growth in domestic demand. The South Pars gas field (shared by both Iran and Qatar) has nearly reached its full potential, and Iran's gas production from this field is said to have surpassed Qatar's production.

The global Gas Treatment Chemicals Market is segmented on the basis of Type and Application. The type segment is segmented as Scale inhibitors and Corrosion Inhibitor, Biocide and Disinfectants, Defoamers and Defoaming Agents, Flocculants and Coagulants, Demulsifiers, Oxygen Scavengers, and Others. The Application segment is further segmented as Refineries, Oil & Gas, Power Plants, Pulp & Paper, Metal & Mining, Food & Beverage, and Others. Among several applications, refineries were found to be the major application for gas treatment chemicals, followed by others.

Refineries process crude oil streams into a broad range of valuable products, such as diesel, gasoline, kerosene, LPG, and waxes, among others. The majority of crude oil streams are sour and contain a considerable percentage of organic sulfur species that are undesired in the product streams. This unwanted sulfur content can be treated and removed from the streams by deploying gas treatment chemicals. Currently, the global refining industry is facing dual impacts from the outbreak of the COVID-19 pandemic and the Saudi-Russia price war. However, these factors are expected to have their impact from the short to mid-term. The continuous capacity additions in the refining industry are likely to impact the sector's supply and demand balance. The growth of the refining industry is likely to be contributed majorly by gasoline and naphtha production. The primary region of focus for refining is likely to be the Asia-Pacific region, owing to the increasing demand for downstream products. Currently, Asia-Pacific accounts for about 35% of the global refining capacity. It is expected to remain the major region

during the forecast period, supported by the planned capacity additions in China and India.

Based on geography, the global Gas treatment chemicals Market is segmented into Asia Pacific, North America, South America, Europe, and Middle East & Africa. Asia-Pacific region is likely to witness the fastest growth during the forecast period.

The United States is the world's largest economy. The GDP of the country has decreased at an annual rate of 5% in the first quarter and 9.5% in the second quarter of 2020, majorly due to the ongoing coronavirus pandemic. Geographically, the United States is the largest producer of gas, followed by Russia, Australia, China, and Iran, among others. The domestic production of gas in the country increase by 10% in 2019, owing to the new developments in the shale formations in Texas and Pennsylvania. In addition to this, new gas and LNG export capacities and high demand from the power sector contributed to the rise in the country's gas production. As of January 2020, the total number of operating refineries in the country was 131, with an operating capacity of 18,548,985 barrels per calendar day. Since 1982, the number of crude oil refineries in the country has decreased from 250 to 131 in 2019. However, the distillation capacity has risen in the existing refineries. The refineries in the country have consistently adapted to increase their scale and reduce costs while maintaining strong operational integrity. The capacity utilization rate of refineries in the country has exceeded 90% for the last five years.

The United States is the second-largest producer of paper in the world and consumes 70 metric tons or 17% of global demand annually. Due to digitization, the consumption of graphic paper has taken a hit in the country, but that is counterbalanced by growth in packaging and hygiene papers. Increased use and hoarding of tissue papers during the Covid-19 pandemic has boosted the market for the paper and pulp industry. The United States recovers more than 52 million tons of paper and paperboard annually. The food and beverage industry is one of the largest manufacturing sectors of the country, accounting for more than 10% of all shipments. Due to sustained economic growth, consumer demand for processed food is expected to increase with rising disposable personal income.

Some of the key players in the gas treatment market are Huntsman Corporation, BASF SE, Dow, Euniseil Chemicals, and Clariant, among others.

On 11 August 2020, it was announced that Haldor Topsoe & BASF is jointly offering optimization solutions to ammonia producers. With Topsoe's connected service,

ClearView Ammonia, and BASF's simulation tool, OASE connect, combined, customers will now be able to get a better and more precise simulation of their ammonia plant operations and in turn optimize their production.

On 09 June 2020, BASF SE and ExxonMobil introduced a new gas treating technology aimed at helping customers lower sulfur and overall CO2 emissions under the name OASE sulfexx.

Our Global Gas Treatment Market report provides deep insight into the current and future state of the Gas Treatment chemicals market across various regions. The study comprehensively analyzes the Gas Treatment Chemicals market by segments based on Type (Scale inhibitors and Corrosion Inhibitor, Biocide and Disinfectants, Defoamers and Defoaming Agents, Flocculants and Coagulants, Demulsifiers, Oxygen Scavengers, and Others), Application (Refineries, Oil & Gas , Power Plants, Pulp & Paper, Metal & Mining , Food & Beverage, and Others), and Geography (Asia-Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 on the market growth in detail. The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trends, market developments, market opportunities, market size, market estimate, market analysis, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies including their market share and projects.

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