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Global Hydro-processing Catalysts Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hydro-processing Catalysts market size is expected to reach $ 2638 million by 2032, rising at a market growth of 3.6% CAGR during the forecast period (2026-2032).

Hydro-processing Catalysts are heterogeneous catalytic materials used under hydrogen-rich conditions to upgrade petroleum fractions and related refinery feedstocks through hydrotreating and hydrocracking reactions. The market principally covers commercial fresh catalysts used for hydrodesulfurization, hydrodenitrogenation, aromatic saturation, contaminant removal, feed pretreatment, residue upgrading and molecular conversion of heavier hydrocarbons into cleaner and higher-value products. Commercial formulations commonly employ cobalt-molybdenum, nickel-molybdenum, nickel-tungsten or other supported active-metal systems, with alumina, modified oxides or zeolitic materials providing the required support and cracking functionality. Hydro-processing Catalysts are deployed across middle-distillate hydrotreaters, residue units, hydrocrackers, VGO/FCC pretreatment units, naphtha hydrotreaters, base-oil facilities and selected renewable-feedstock units.

Key Findings

Global Hydro-processing Catalysts sales reached 138.57 K MT in 2025

Average EXW pricing was approximately USD 14,445 per MT in 2025

China and Asia-Pacific ex-China together represented about 40.5% of 2025 demand

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Hydrotreating Catalysts accounted for approximately 77% of global shipment volume

Middle Distillate Hydrotreating represented approximately 34% of 2025 demand

The five largest supplier groups represented approximately 56% of 2025 market value

Market Trends

Hydro-processing Catalysts are moving toward higher activity, greater feed flexibility, longer operating cycles and more application-specific catalyst stacking. Refiners increasingly need catalyst systems that can maintain desulfurization, denitrogenation and aromatic-saturation performance when processing heavier, more variable or contamination-prone feeds. Hydrocracking technology is also gaining strategic importance in newer complex refineries because it offers product-slate flexibility and high-quality middle-distillate production. At the same time, renewable-feed processing is creating a second technology pathway for catalyst development. HVO, HEFA, renewable diesel and SAF projects require improved hydrodeoxygenation, contaminant tolerance and cold-flow management. Co-processing in existing hydroprocessing units provides another route for refiners seeking lower-capital renewable-fuel exposure. The geographic center of refinery investment is gradually shifting toward Asia, the Middle East and selected emerging markets, while mature European and North American refinery systems face greater closure and rationalization pressure.

Market Dynamics

Drivers

Demand for Hydro-processing Catalysts is supported by recurring refinery catalyst replacement, tighter fuel-quality requirements, heavier and more diverse feedstocks, higher refinery conversion complexity and continued investment in hydrocracking and desulfurization capacity. OPEC's current refinery outlook indicates that hydrocracking represents a substantial portion of medium-term conversion additions, while Asia-Pacific, China, the Middle East and Africa account for most planned desulfurization capacity expansion. These developments increase demand for high-activity hydrotreating, pretreatment and hydrocracking catalyst systems.

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Restraints

The market faces structural pressure from weak growth in conventional refined-product demand, refinery closures in mature markets and uneven replacement cycles. Catalyst purchases are concentrated around turnarounds, which can create material year-to-year volatility even when underlying refinery throughput is stable. Nickel, molybdenum, cobalt and tungsten costs also affect manufacturing economics and pricing, while strong competition can limit the ability to pass raw-material changes through immediately. Topsoe reported weaker catalyst margins in 2025 as price competition intensified in several regions. Longer-term refinery rationalization in Europe and parts of North America limits incremental catalyst volume in those markets.

Opportunities

The strongest opportunities are associated with complex refinery additions in Asia and the Middle East, deeper residue conversion, high-severity hydrocracking and renewable-feed hydroprocessing. Newer integrated refineries require catalyst systems that can handle heavier feeds while increasing middle-distillate and petrochemical feedstock yields. Renewable diesel and SAF create a smaller but faster-developing opportunity, particularly for catalysts engineered for hydrodeoxygenation, difficult waste-derived feeds and renewable co-processing. Existing hydroprocessing assets also provide a practical retrofit route because some refiners can introduce renewable feed without building a completely new conversion train.

Challenges

Commercial qualification remains a major barrier because refiners place high value on demonstrated cycle length, product yield, pressure-drop control and predictable performance under specific feed conditions. Switching suppliers can therefore require pilot evaluation, reference-unit evidence and a full operating-cycle assessment. Feed contaminants, fouling, hydrogen availability and changing refinery severity complicate catalyst selection. Geopolitical restrictions and regional supply-chain fragmentation can also alter purchasing behavior quickly, encouraging local catalyst manufacturing but raising qualification and consistency requirements. Renewable feeds introduce additional operating issues such as phosphorus contamination, CO and CO2 accumulation and higher fouling risk, requiring further catalyst and loading-system development.

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Industry Chain Analysis

The upstream chain for Hydro-processing Catalysts centers on catalyst-grade alumina and other support materials, zeolites, molybdenum, nickel, cobalt and tungsten compounds, binders and specialty additives. Active metals represent an important component of material cost, particularly for high-loading NiMo and NiW systems, while support characteristics and zeolite chemistry materially influence activity, selectivity and catalyst life. Catalyst producers combine materials development, formulation, manufacturing, quality control and application engineering. The commercial value of a catalyst is determined by its performance in a specific reactor environment rather than by material content alone, so refinery references, loading design, catalyst stacking and technical support influence supplier positioning.

Downstream demand is generated by refinery hydrotreaters, hydrocrackers, residue-upgrading units, VGO/FCC pretreatment units, base-oil plants and renewable-fuel facilities. Catalyst replacement occurs primarily during refinery turnarounds or at the end of an operating cycle, making demand less linear than refinery throughput. Suppliers with broad catalyst portfolios can capture additional value by designing multi-bed systems across guard, pretreatment and conversion layers. Used-catalyst regeneration and rejuvenation form a parallel service chain, but the fresh-catalyst market remains economically distinct because regenerated material reuses an existing catalyst inventory rather than creating a new physical catalyst unit.

Segment Insights

Hydrotreating Catalysts accounted for approximately 77% of 2025 shipment volume, reflecting their use across middle distillates, naphtha, VGO pretreatment, hydrocracker pretreatment and residue processing. Hydrocracking Catalysts represented the remaining 23% by volume but generated a higher value contribution relative to tonnage because zeolitic and high-performance conversion catalysts generally carry higher unit values. This value difference makes hydrocracking strategically important even though hydrotreating remains the larger physical-volume segment.

By active-metal system, CoMo represented approximately 42% of volume and NiMo approximately 38%, making these the two dominant commercial formulations. NiW represented about 13%, with the balance distributed among mixed-metal and other specialized systems. CoMo remains widely used where strong hydrodesulfurization

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performance and cost efficiency are priorities. NiMo is more prominent in higher-severity hydrotreating, hydrodenitrogenation and hydrocracker pretreatment, while NiW is concentrated in selected high-value hydrocracking and hydrogenation applications.

Downstream Market Opportunities

Middle Distillate Hydrotreating remains the largest downstream opportunity, accounting for approximately 34% of 2025 demand and supported by recurring catalyst replacement across diesel, kerosene and related distillate units. Hydrocracking represents another major value pool because refiners increasingly seek feed flexibility and higher yields of premium middle distillates. Residue Hydroprocessing is particularly relevant in China, the Middle East and other regions processing medium and heavy sour crudes. Renewable Feedstock Hydroprocessing remains a smaller installed segment, but HVO, HEFA, SAF and renewable co-processing are creating demand for differentiated catalysts able to manage oxygen removal, contaminants, hydrogen consumption and cold-flow requirements.

Regional Insights

China and Asia-Pacific ex-China together accounted for approximately 40.5% of 2025 Hydro-processing Catalysts demand, giving Asia the largest regional demand concentration. China benefits from a large refining base and extensive domestic catalyst manufacturing, while India and other Asian markets continue to add or upgrade high-complexity refining capacity. North America remains a high-value market because of its installed hydrocracking, distillate and VGO-processing base, although replacement cycles and refinery rationalization can produce volatile annual purchasing. The Middle East accounted for approximately 12% of demand and has a stronger medium-term opportunity profile as new export-oriented integrated refineries add hydrocracking and desulfurization capacity. Europe retains a substantial installed catalyst base, but closures and weak conventional fuel-demand growth constrain incremental volume. IEA and OPEC outlooks indicate that refinery investment and conversion additions are increasingly concentrated east of Suez and in the Middle East.

Competitive Landscape Analysis

The global Hydro-processing Catalysts market is moderately concentrated, with the five largest supplier groups estimated to represent approximately 56% of 2025 market

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value. ART Hydroprocessing, Topsoe, Ketjen, Shell Catalysts & Technologies and Honeywell UOP form the principal global supplier tier in the research model, supported by broad refinery references, proprietary catalyst platforms and international technical-service networks. Zeolyst has a particularly strong position in hydrocracking and states that its catalysts serve about 30% of worldwide hydrocracking requirements, while Axens combines catalyst supply with refinery-process technology. Sinopec Catalyst and PetroChina Fushun Petrochemical provide significant domestic capacity in China, and Nippon Ketjen is an established manufacturing platform in Japan. Russian and Chinese regional producers have become more relevant as supply security and localization gain importance. Competitive advantage depends on industrial performance history, cycle length, feed flexibility, technical support and customer qualification. Price remains important, particularly in standard hydrotreating applications, but qualification barriers limit rapid switching in high-severity hydrocracking and residue applications.

Report Scope

This report studies the global Hydro-processing Catalysts production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hydro-processing Catalysts and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Hydro-processing Catalysts that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hydro-processing Catalysts total production and demand, 2021-2032, (Kilotons)

Global Hydro-processing Catalysts total production value, 2021-2032, (USD Million)

Global Hydro-processing Catalysts production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Hydro-processing Catalysts consumption by region & country, CAGR,

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2021-2032 & (Kilotons)

U.S. VS China: Hydro-processing Catalysts domestic production, consumption, key domestic manufacturers and share

Global Hydro-processing Catalysts production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Hydro-processing Catalysts production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Hydro-processing Catalysts production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Hydro-processing Catalysts market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Advanced Refining Technologies, Topsoe, Ketjen, Shell Catalysts & Technologies, Honeywell UOP, Zeolyst International, Axens, Sinopec Catalyst, PetroChina, IndianOil, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Hydro-processing Catalysts market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Hydro-processing Catalysts Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Hydro-processing Catalysts Market, Segmentation by Type:

Hydrotreating

Hydrocracking

Global Hydro-processing Catalysts Market, Segmentation by Active Metal:

CoMo Catalysts

NiMo Catalysts

NiW Catalysts

Other Metal Systems

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Global Hydro-processing Catalysts Market, Segmentation by Channel:

Direct Sale

Indirect Sale

Global Hydro-processing Catalysts Market, Segmentation by Application:

Middle Distillate Hydrotreating

Residue Hydroprocessing

Base Oil Hydroprocessing

VGO/FCC Pretreat

Naphtha Hydrotreating

Renewable Feedstock Hydroprocessing

Other Hydroprocessing

Companies Profiled:

Advanced Refining Technologies

Topsoe

Ketjen

Shell Catalysts & Technologies

Honeywell UOP

Zeolyst International

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Axens

Sinopec Catalyst

PetroChina

IndianOil

RN-Kat

SKTB Katalizator

Rezel Catalysts

Shandong Gongquan Chemical

Zibo Qimao Catalyst

Beijing Haixin Energy Technology

Key Questions Answered

1. How big is the global Hydro-processing Catalysts market?
2. What is the demand of the global Hydro-processing Catalysts market?
3. What is the year over year growth of the global Hydro-processing Catalysts market?
4. What is the total value of the global Hydro-processing Catalysts market?
5. Who are the Major Players in the global Hydro-processing Catalysts market?
6. What are the growth factors driving the market demand?

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