

Global Mercury Removal Adsorbents Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mercury Removal Adsorbents market size is expected to reach \$ 302 million by 2032, rising at a market growth of 4.3% CAGR during the forecast period (2026-2032).

Mercury removal adsorbents are engineered media loaded into fixed guard beds or injected into process streams to capture elemental mercury, ionic mercury and organomercury species from gas, liquid and flue gas. In natural gas and LNG pretreatment these adsorbents, often proprietary metal sulfide or promoted alumina chemistries, sit upstream of cryogenic heat exchangers and hydrogenation catalysts and strip mercury to protect aluminum brazed exchangers from catastrophic embrittlement and to prevent catalyst poisoning. Honeywell UOP publicly positions regenerable HgSIV molecular sieve beds and non regenerable metal oxide beds specifically for mercury removal in natural gas, LPG and other light hydrocarbon streams in order to protect downstream equipment and extend run length.

In coal fired power plants, cement kilns and hazardous waste incinerators, powdered activated carbon such as Calgon Carbon FLUEPAC is pneumatically injected into hot flue gas where its extremely high surface area adsorbs oxidized and elemental mercury. Calgon Carbon describes powdered activated carbon injection as best available control technology for mercury capture in flue gas and reports decades of commercial supply into coal utilities and waste combustors to meet tightening stack emission rules. Wastewater and groundwater polishing systems use functionalized alumina media such as Sorbster Hg 1 which covalently bonds dissolved ionic mercury onto engineered active sites and can drive outlet concentrations down to parts per billion in industrial water cleanup and remediation campaigns.

On the supply side, upstream inputs are specialty porous solids such as activated carbon, promoted alumina, metal sulfide impregnated pellets and noble metal supported media, all of which require controlled formulation, impregnation and shaping know how similar to refinery catalyst manufacturing. Leading suppliers in 2024 include Honeywell UOP, Calgon Carbon Corporation, Johnson Matthey, Cabot Corporation, Pall Corporation, BASF, Axens, SLB, UNICAT Catalyst Technologies, and multiple Chinese fixed bed and high temperature flue gas sorbent makers.

These companies typically deliver either replaceable guard bed loads for gas plants and refineries or bulk powders for air pollution control. The downstream buyers are natural gas processors and LNG liquefaction trains, refinery hydrogen and syngas purification units, coal fired and waste to energy plants subject to mercury air toxics standards, and industrial wastewater treatment contractors that guarantee discharge compliance. Commercial practice is often multi year frame agreements or repeated spot reloads rather than one off capital projects, because mercury beds and powdered carbons are consumable media that saturate and must be changed out, which locks in recurring demand and supports specialty margin levels around the low to mid twenties as a percent of sales for purification adsorbents and guard bed media in refining and gas processing. This is consistent with how UNICAT and similar purification players frame their value proposition, emphasizing long adsorbent life, run length extension, catalyst protection and on site technical support rather than commodity bulk chemistry alone.

In the current market, global production is around 22300 metric tons of mercury removal adsorbent media in 2024, with an average selling price of about 9552 United States dollars per metric ton on an EXW basis. The supplier landscape is moderately concentrated. Multiple recent industry summaries list Honeywell UOP, Calgon Carbon Corporation, Johnson Matthey, Cabot Corporation and Pall Corporation among the dominant vendors for mercury removal adsorbents alongside BASF, Axens, SLB, UNICAT, and Chinese players such as Beijing Sanju, Nanjing Linda and Nanjing Zhengsen. Aggregating these top suppliers indicates that the top five groups control roughly forty five to fifty five percent of global revenue, which is typical of a mature purification and emissions control niche where technology qualification, safety critical duty and regulatory liability favor incumbents. Asia Pacific demand is accelerating as China and other regional industrial bases tighten mercury emissions and wastewater discharge rules and expand coal to chemicals, LNG import and hazardous waste incineration capacity. Public market research snapshots in 2025 describe Asia Pacific as approaching forty percent of incremental growth, with China alone cited above twenty percent of global demand share.

This report studies the global Mercury Removal Adsorbents production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mercury Removal Adsorbents 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 Mercury Removal Adsorbents that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mercury Removal Adsorbents total production and demand, 2021-2032, (MT)
Global Mercury Removal Adsorbents total production value, 2021-2032, (USD Million)
Global Mercury Removal Adsorbents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)
Global Mercury Removal Adsorbents consumption by region & country, CAGR, 2021-2032 & (MT)
U.S. VS China: Mercury Removal Adsorbents domestic production, consumption, key domestic manufacturers and share
Global Mercury Removal Adsorbents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)
Global Mercury Removal Adsorbents production by Chemistry, production, value, CAGR, 2021-2032, (USD Million) & (MT)
Global Mercury Removal Adsorbents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Mercury Removal Adsorbents 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 Honeywell UOP, Calgon Carbon Corporation, Johnson Matthey, Cabot Corporation, Pall Corporation, BASF SE, Axens, SLB, UNICAT Catalyst Technologies, LLC, Nucon International Inc., 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 Mercury Removal Adsorbents market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/MT) by manufacturer, by Chemistry, 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 Mercury Removal Adsorbents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mercury Removal Adsorbents Market, Segmentation by Chemistry:

Metal Sulfide

Impregnated Activated Carbon

Functionalized Alumina

Noble Metal Supported Adsorbent

Other Inorganic Media

Global Mercury Removal Adsorbents Market, Segmentation by Physical Form:

- Fixed-bed Pellet
- Powdered Injection Carbon
- Cartridge or Filter Media
- Other

Global Mercury Removal Adsorbents Market, Segmentation by Process Stage:

- Natural Gas and LNG Pretreatment
- Refinery and Hydrogen Stream Polishing
- Flue Gas Mercury Capture
- Wastewater and Groundwater Polishing
- Other Industrial Streams

Global Mercury Removal Adsorbents Market, Segmentation by Application:

- Natural Gas and LNG Processing
- Refining and Petrochemical Hydrogen or Syngas Purification
- Coal Fired Power Generation and Industrial Flue Gas Control
- Industrial Wastewater and Groundwater Remediation
- Other Industrial Uses

Companies Profiled:

Honeywell UOP

Calgon Carbon Corporation

Johnson Matthey

Cabot Corporation

Pall Corporation

BASF SE

Axens

SLB

UNICAT Catalyst Technologies, LLC

Nucon International Inc.

Sorbster

Medaad Activated Carbon

Chempack

Haixin

Nanjing Linda

Nanjing Zhengsen Environmental Protection Technology Co., Ltd.

Wuhan Kelin Chemical Group Co., Ltd.

Key Questions Answered:

1. How big is the global Mercury Removal Adsorbents market?
2. What is the demand of the global Mercury Removal Adsorbents market?
3. What is the year over year growth of the global Mercury Removal Adsorbents

market?

4. What is the production and production value of the global Mercury Removal Adsorbents market?
5. Who are the key producers in the global Mercury Removal Adsorbents market?
6. What are the growth factors driving the market demand?

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