

Global Renewable Fuel Hydrotreating Catalyst Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Renewable Fuel Hydrotreating Catalyst market size is expected to reach \$ 304 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

Renewable fuel hydrotreating catalysts are fixed-bed catalyst systems used in HVO/HEFA, renewable diesel, SAF, and renewable naphtha production units. They typically include guard bed, hydrodeoxygenation, olefin/aromatic saturation, isomerization dewaxing, and mild cracking catalysts. These products are mainly based on NiMo, CoMo, NiW, precious metal, or bifunctional molecular sieve systems. They are used to treat impurities such as oxygen, silicon, phosphorus, metals, and chlorine in feedstocks including waste oils and fats, vegetable oils, animal fats, tall oil, and pyrolysis oil, with the goal of improving liquid yield, cold-flow performance, and unit operating cycle. The product's gross margin is approximately 38%.

On the demand side, core incremental growth comes from renewable diesel and HEFA/SAF units. North America remains the largest single market; Europe is driven by RED III, ReFuelEU Aviation, and marine fuel decarbonization requirements; and new Asian projects are more focused on export-oriented SAF and HVO configurations. Compared with conventional diesel hydrotreating, renewable lipid feedstocks have high oxygen content and are accompanied by silicon, phosphorus, alkali metals, chlorine, high acid value, and other issues. Therefore, simply applying conventional diesel hydrotreating catalysts makes it difficult to ensure yield and cycle length, driving continued growth in the use of dedicated guard beds, hydrodeoxygenation catalysts, and isomerization catalysts.

On the supply side, the market is concentrated among a small number of companies

with refining hydrotreating experience and process package capabilities. Suppliers such as Topsoe, Honeywell UOP, Axens, Shell, BASF, Ketjen, ART/Grace, and CLG usually bundle catalysts with unit design, start-up sulfiding, operational optimization, and regeneration services. Customers place greater emphasis on full-cycle liquid yield, hydrogen consumption, pressure drop, and catalyst replacement cycle than on catalyst price per ton. As the share of used oils and fats, animal fats, and low-grade lipid feedstocks increases, high-impurity-tolerant guard materials, silicon/phosphorus scavengers, and low-cracking isomerization catalysts become more valuable.

In the mid-term, growth is expected to outpace ordinary refinery hydrotreating catalysts, mainly due to HEFA project start-ups, catalyst replacement in existing units, higher isomerization/cracking requirements under SAF production mode, and increased guard material consumption caused by lower-quality feedstocks.

This report studies the global Renewable Fuel Hydrotreating Catalyst production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Renewable Fuel Hydrotreating Catalyst 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 Renewable Fuel Hydrotreating Catalyst that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Renewable Fuel Hydrotreating Catalyst total production and demand, 2021-2032, (kg)

Global Renewable Fuel Hydrotreating Catalyst total production value, 2021-2032, (USD Million)

Global Renewable Fuel Hydrotreating Catalyst production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Renewable Fuel Hydrotreating Catalyst consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Renewable Fuel Hydrotreating Catalyst domestic production, consumption, key domestic manufacturers and share

Global Renewable Fuel Hydrotreating Catalyst production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Renewable Fuel Hydrotreating Catalyst production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Renewable Fuel Hydrotreating Catalyst production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Renewable Fuel Hydrotreating Catalyst 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 Topsoe, Honeywell UOP, Axens, Shell Catalysts & Technologies, BASF, Ketjen, Advanced Refining Technologies, Chevron Lummus Global, Elessent Clean Technologies, JGC Catalysts and Chemicals, 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 Renewable Fuel Hydrotreating Catalyst market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 Renewable Fuel Hydrotreating Catalyst Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Renewable Fuel Hydrotreating Catalyst Market, Segmentation by Type:

Guard and Grading Catalysts

Hydrodeoxygenation Catalysts

Hydroisomerization Catalysts

Hydrocracking and Dewaxing Catalysts

Saturation and Finishing Catalysts

Other Catalysts

Global Renewable Fuel Hydrotreating Catalyst Market, Segmentation by Active Metal System:

NiMo Catalysts

CoMo Catalysts

NiW Catalysts

Noble Metal Catalysts

Non-Sulfide Base Metal Catalysts

Other Metal Systems

Global Renewable Fuel Hydrotreating Catalyst Market, Segmentation by Feedstock Duty:

100% Lipid Feed Catalysts

Co-Processing Feed Catalysts

High-Contaminant Feed Catalysts

Pyrolysis Oil Feed Catalysts

Other Feed Catalysts

Global Renewable Fuel Hydrotreating Catalyst Market, Segmentation by Supply State:

Oxide Catalysts

Presulfided Catalysts

Regenerated Catalysts

Rejuvenated Catalysts

Other Supply States

Global Renewable Fuel Hydrotreating Catalyst Market, Segmentation by Application:

Renewable Diesel Production

Sustainable Aviation Fuel Production

Renewable Naphtha Production

Bio-LPG and Propane Production

Refinery Co-Processing

Pyrolysis Oil Upgrading

Feedstock Pretreatment Guard Beds

Companies Profiled:

Topsoe

Honeywell UOP

Axens

Shell Catalysts & Technologies

BASF

Ketjen

Advanced Refining Technologies

Chevron Lummus Global

Ellessent Clean Technologies

JGC Catalysts and Chemicals

Sinopec Catalyst

PetroChina

Key Questions Answered:

1. How big is the global Renewable Fuel Hydrotreating Catalyst market?
2. What is the demand of the global Renewable Fuel Hydrotreating Catalyst market?
3. What is the year over year growth of the global Renewable Fuel Hydrotreating Catalyst market?
4. What is the production and production value of the global Renewable Fuel Hydrotreating Catalyst market?
5. Who are the key producers in the global Renewable Fuel Hydrotreating Catalyst market?
6. What are the growth factors driving the market demand?

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