

Global Hydrocracking Process Solutions Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Hydrocracking Process Solutions market size is predicted to grow from US\$ 1246 million in 2025 to US\$ 1651 million in 2032; it is expected to grow at a CAGR of 4.2% from 2026 to 2032.

Hydrocracking is a catalytic chemical process used for deep oil processing in petroleum refineries for converting the high-boiling constituent hydrocarbons in petroleum crude oils to more valuable lower-boiling products such as gasoline, kerosene, jet fuel and diesel oil. The process takes place in a hydrogen-rich atmosphere at elevated temperatures (260 – 425 °C) and pressures (35 – 200 bar).

By the hydrocracking process heavy oils can undergo hydrogenation, isomerization and cracking reactions in the presence of the catalyst and hydrogen for increasing hydrogen to carbon ratios of the products. The hydrocracking process, in fact is a combination of hydrotreating and catalytic cracking processes. On one hand, heavy oils can be converted by hydrocracking into light oils such as gasoline, jet fuel and light diesel oil. Meanwhile no great amounts of coke can be formed. By this process the sulfur, nitrogen and oxygen non-hydrocarbon compounds can be removed and the olefins can be saturated by hydrogenations.

Basically, hydrocracking plants are capable of processing a wide variety of feedstocks of different characteristics to produce a broad range of products. They can be designed and operated to maximize the production of a gasoline blending component (called hydrocrackate) or to maximize the production of diesel oil.

In this report, hydrocracking process refers to the hydrocracking process solutions, include all the key elements of a hydrocracking unit comprising hydrocracker

pretreatment, hydrocracking and grading catalysts, technology licensing including heavy poly-nuclear aromatic (HPNA) management solutions and high-performance reactor internals, etc.

Hydrocracking is a catalytic chemical process used for deep oil processing in petroleum refineries for converting the high-boiling constituent hydrocarbons in petroleum crude oils to more valuable lower-boiling products such as gasoline, kerosene, jet fuel and diesel oil. The process takes place in a hydrogen-rich atmosphere at elevated temperatures (260 – 425 °C) and pressures (35 – 200 bar).

Many North American refineries are investing in hydrocracking technology to enhance production flexibility and improve yield of high-value products like diesel and jet fuel, in response to fluctuating global oil demand and fuel prices. With increasing environmental regulations in North America, particularly in the U.S. and Canada, there is a growing need for ultra-low sulfur diesel (ULSD) and cleaner fuels. Hydrocracking plays a critical role in reducing sulfur content in fuels, meeting regulatory standards like those set by the EPA. North American market for Hydrocracking Process is estimated to increase from \$ 371.66 million in 2023 to reach \$ 457.52 million by 2030, at a CAGR of 3.29% during the forecast period of 2024 through 2030.

The Asia-Pacific Hydrocracking Process market is experiencing significant growth due to the region's increasing energy demand, expanding refinery capacities, and a strong focus on producing cleaner fuels. Asia-Pacific market for Hydrocracking Process is estimated to increase from \$ 421.84 million in 2023 to reach \$ 607.55 million by 2030, at a CAGR of 5.04% during the forecast period of 2024 through 2030. With rapid industrialization and urbanization in countries such as China, India, and Southeast Asia, there is a rising demand for transportation fuels, particularly diesel and jet fuel. Hydrocracking allows refiners to produce higher yields of these in-demand fuels from heavy feedstocks.

China: As the largest energy consumer in the region, China is investing heavily in hydrocracking technology to meet domestic demand for cleaner fuels and reduce reliance on imported refined products.

India: With rising transportation fuel demand, India is focusing on expanding its refining capacity and incorporating hydrocracking to produce cleaner, low-sulfur fuels, in line with its Bharat Stage VI (BS-VI) emissions standards.

Southeast Asia: Countries like Indonesia and Malaysia are also increasing their

investments in refining infrastructure, with hydrocracking playing a critical role in upgrading fuel quality to meet regional standards.

Hydrocracking process can be divided into Single-Stage Hydrocracking Process and Two-Stage Hydrocracking Process. In 2023, Single-Stage Hydrocracking Process accounted for a share of 66.40% in the global Hydrocracking Process market. And this product segment is poised to reach US\$ 992.73 million by 2030 from US\$ 785.84 million in 2023.

The major global companies of Hydrocracking Process include Shell Catalysts & Technologies, ExxonMobil, Advanced Refining Technologies (ART), Honeywell UOP, Topsoe, Sinopec, Johnson Matthey, Axens, CNPC, Elessent Clean Technologies, etc. In 2023, the world's top three vendors accounted for approximately 55.11% of the revenue.

At the majority of foreign refineries with deep oil refining, hydrocracking process existence is very important. Besides increasing oil refining depth, hydrocracking is the main process, influencing process scheme flexibility of the enterprise and its commercial product quality. When other treatment processes of residues from oil refining are absent at the refinery, generally, full conversion hydrocracking with specific product purpose is applied.

In the cases, when the refinery already has oil residues conversion processes, the most attractive is application of partial conversion hydrocracking and its combination with other conversion processes. In this case, hydrocracking uses poor-quality gasoils of other processes and produces high-quality residue which serves as upgraded feed or feed component of the same units. Vacuum gasoil hydrocracking residue is an excellent feedstock for ethylene units, surpassing other feed types in efficiency.

Thus, existence of hydrocracking in the process scheme of the refinery considerably increases flexibility and, accordingly, efficiency of its operation.

LPI (LP Information)' newest research report, the "Hydrocracking Process Solutions Industry Forecast" looks at past sales and reviews total world Hydrocracking Process Solutions sales in 2025, providing a comprehensive analysis by region and market sector of projected Hydrocracking Process Solutions sales for 2026 through 2032. With Hydrocracking Process Solutions sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Hydrocracking Process Solutions industry.

This Insight Report provides a comprehensive analysis of the global Hydrocracking Process Solutions landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Hydrocracking Process Solutions portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Hydrocracking Process Solutions market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Hydrocracking Process Solutions and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Hydrocracking Process Solutions.

This report presents a comprehensive overview, market shares, and growth opportunities of Hydrocracking Process Solutions market by product type, application, key players and key regions and countries.

Segmentation by Type:

Single-Stage Hydrocracking Process

Two-Stage Hydrocracking Process

Segmentation by Application:

Gasoline

Jet Fuel

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Shell Catalysts & Technologies

ExxonMobil

Advanced Refining Technologies (ART)

Honeywell UOP

Topsoe

Sinopec

Johnson Matthey

Axens

CNPC

Elessent Clean Technologies

The report requires updating with new data and is sent in 48 hours after order is placed.

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