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Catalyst Regeneration Market by Technology (Off-site regeneration and On-site regeneration), by Application (Refinery, Chemicals & Petrochemicals, and Others), by Region (North America, Europe, Asia-Pacific, and Rest of the World) - Forecast till 2019

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Abstracts

The catalyst regeneration market was estimated around $3.6 Billion in 2013, with the highest share of more than 60% held by the Europe and Asia-Pacific together. The global market is projected to grow at a CAGR of 5.5% from 2014 to 2019 to reach $5 billion by 2019. The highest growth is forecasted to be in the Asia-Pacific due to the rising refinery capacity and increasing use of catalyst regeneration process, especially in China. ROW is estimated to have the second highest growth at 5.65% from 2014 to 2019.

The numbers of spent catalyst supplying and regenerated catalyst using companies are large in numbers. However, the number of catalyst regenerators is limited. Catalyst regeneration market is a capital intensive market with patented technologies and stringent environmental regulations. Thus the market is dominated mainly by the large players.

The demand for catalyst regeneration service is rising as environmental regulations are getting stringent day by day. Besides, the need for cost optimization strategies is also driving the market. On the other hand, the popularity and superior results of rejuvenation process is hampering the market growth to some extent.

Eurecat S.A. (France) and Porocel Industries LLC (U.S.) are the important active players in the catalyst regeneration market. These companies showed the highest strategy adoptions amongst other players in the catalyst regeneration market from 2010

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to 2014.

From 2010 to 2014, expansion was observed as the most important growth strategy adopted by the major catalyst regenerators, accounting for a share of 33% of the total strategies adopted by the players. The other companies CoaLogix (U.S.), STEAG Energy Service LLC (U.S.), and Cormetech (U.S.) also contributed to the market activities in the global catalyst regeneration market during the mentioned period.

The key companies offering catalyst regeneration services also collaborated with other players in the market to increase their presence in different region and provide a wide variety of services. The regeneration processes used by the major regenerators are patented processes and they have also licensed their technology to different catalyst related companies over the world. Some companies have also followed the acquisition strategy to strengthen their position in the catalyst regeneration market. The large players of the market actively participated in expanding their global reach and widening their services, while the small companies concentrated more on collaborating with leading players and providing quality services.

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About

A catalyst is a substance that speeds up the process of chemical reactions. Catalysts are widely used in oil refineries, chemical, and petrochemical industries and other industries such as power, energy, and environment. Over a period of time, the performance of the catalysts deteriorates gradually when used in oil refineries, petrochemical plants, and other chemical plants. In oil refineries and petrochemical plants, catalysts get deactivated due to coke deposits, sintering, and metal contamination.

Once the spent catalyst runs its course, it is disposed of in the environment which results in pollution. Due to a rise in the stringent environment regulations, the demand for regeneration of spent catalysts has been growing in oil refineries and petrochemical industries. The decrease in refinery margins has also been pushing major refiners towards cost optimization. Therefore, the regeneration of spent catalyst has emerged as a feasible solution rather than its disposal in the environment. However, the poisoning of catalysts by various contaminants namely vanadium, arsenic or silicon pose as limitations for the regeneration of spent catalysts.

The global catalyst regeneration market in terms of value is expected to grow at a CAGR of XX% from 2014 to 2019 and the global catalyst regeneration in terms of volume is expected to grow at a CAGR of XX% from 2014 to 2019. The global regenerated catalysts applied in refineries are expected to grow at the highest CAGR of XX% between 2014 and 2019, in terms of value followed by chemicals and petrochemicals industries at a CAGR of XX% between 2014 and 2019, in terms of value.

The refinery capacity is expected to grow the fastest in Asia-Pacific followed by RoW in the next five years. This is expected to increase the penetration level of catalyst regeneration in oil refineries and other petrochemical industries. In Asia-Pacific, the regenerated catalyst market in terms of volume is expected to reach XX KT by 2019 at a CAGR of XX% from 2014 to 2019. In Asia-Pacific, the refinery capacities of China, India, Japan, and South Korea are expected to outgrow the 2013 refinery capacities in the next five years.

In Europe, the market for regeneration of catalyst in terms of value in Russia is expected to grow at the highest CAGR of XX% from 2014 to 2019 due to large refinery capacities and growth in the petrochemical and environment industries. The countries in

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Europe follow stringent environment regulations to control the harmful industrial emissions. The recent discovery of shale gas in the U.S. is speculated to boost the country's refining industry by the coming decade. The catalyst regeneration market of North America in terms of value is expected to reach $XX million by 2019 and is expected to grow at a CAGR of XX% from 2014 to 2019.

The regeneration of catalyst is carried out through off-site regeneration or on-site regeneration technology. Lately, the off-site regeneration of catalyst is preferred by oil refining and petrochemical industries over on-site regeneration of catalyst. This is mainly because of the stringent environmental concerns over the release of harmful emissions during the process of on-site regeneration of catalysts which are comparatively more in number than during the off-site regeneration of catalysts. The other reasons for the shift towards off-site regeneration of catalysts are better performance of regenerated catalysts which need to be as good as the fresh catalysts, safety and time considerations, and the need to reduce operating costs.

The global catalyst regeneration market in terms of value for off-site regeneration of catalysts is projected to grow at a high CAGR of XX% from 2014 to 2019. The on-site regeneration of catalyst is expected to grow at a slow rate due to higher levels of harmful emissions and safety concerns. But there are certain oil refining and petrochemical industries which still perform on-site regeneration of catalysts for FCC or fluid cracking catalyst units. The global catalyst regeneration market for on-site regeneration in terms of value is expected to grow at XX% from 2014 to 2019.

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