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Refinery Catalysts Market by Type (FCC Catalysts, Hydrotreating Catalysts, Hydrocracking Catalysts, Catalytic Reforming Catalysts), Ingredients (Zeolites, Metals, Chemical Compounds), and Region - Global Forecast to 2029

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Abstracts

The Refinery catalysts market is projected to reach USD 6.8 billion by 2029, at a CAGR of 4.0% from USD 5.6 billion in 2024. Refinery catalysts are used in refineries to produce high quality fuels with low emissions. Their ability to remove impurities and lower sulfur content along with enhancing the chemical processes makes them useful for refining applications. In the oil refineries, refinery catalysts are used to aid the chemical reactions to upgrade oil products by reducing the content of nitrogen, metals, sulfur, carbon, aromatics and other impurities from feedstock.

“Based on ingredient, zeolites are expected to be the fastest growing market during the forecast period, in terms of value.”

Zeolites ingredients are the fastest growing in refinery catalysts due to their high acid strength which is vital for catalysing various reactions such as cracking, isomerization, and alkylation. They are generally stable at high temperatures making the appropriate for industrial applications. Zeolites can be utilized through ion exchange and chemical modifications to improve their catalytic properties for specific reactions like petroleum refining, oil production and environmental applications.

“Based on type, FCC Catalysts is the largest market during the forecast period, in terms of value.”

FCC Catalysts constitute the largest market in refineries market. These catalysts create new and smaller molecules from larger molecules to make gasoline and distillate fuels. They help in lowering sulfur content get high octane numbers, low NOx emissions, and low levels of carbon monoxide. FCC catalysts aid in conversion process and mitigate severe operating conditions. This helps to maximize the yield of high-quality products

from crude oil. They are very versatile and can process a wide range of feed stocks making them suitable for various refinery operations.

“Based on region, North America is the second largest market for refinery catalysts during the forecast period, in terms of value.”

The refinery catalyst market in North America has witnessed robust growth driven by need for efficient refinery processes, strict environmental regulations regarding emissions and fuel quality. The region has high number of oil reserves and requires refinery catalysts in order to meet the increasing demand of refined petroleum products while adhering to mandates for high quality and environmental regulations

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

By Designation: C-Level - 35%, Director Level - 25%, and Others - 40%

By Region: North America - 30%, Europe - 20%, Asia Pacific - 40%, Middle East & Africa-5%, and Latin America-5%

The key players in this market are Albemarle Corporation (US), W R Grace (US), BASF (Germany), Haldor Topsoe (Denmark), Honeywell UOP (US), Clariant (Switzerland), Axens (France), Johnson Matthey (UK), China Petroleum and Chemical Corporation (Sinopec) (China), and Shell Catalyst & Technologies (Netherlands).

Research Coverage

This report segments the refinery catalysts market based on type, ingredients, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products and services, key strategies, new product launches, expansions, and mergers and acquisitions associated with the refinery catalysts market.

Key benefits of buying this report

This research report focuses on various levels of analysis, including industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the refinery catalysts market, high-growth regions, and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing demand for cleaner fuels,), restraints (Availability of substitute materials), opportunities (Shift towards renewable fuels) and challenges (Volatile prices of precious group metals).

Market Penetration: Comprehensive information on the refinery catalysts market offered by top players in the global refinery catalysts market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the refinery catalysts market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for refinery catalysts market across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global refinery catalysts market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the refinery catalysts market

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FIGURE 57 ARKEMA: COMPANY SNAPSHOT

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About

Refining catalysts are used to refine crude oil. Shale oils nowadays are becoming a major feed source for large number of refineries. While these feedstock are generally sweet and light, issues the refiners are facing when processing tight oil include: contaminant metals, configurational imbalances and heat balance effects, in the refinery. The refiners can now apply new catalyst technologies to maximize the value present in tight oil feedstock. Refinery catalysts play a vital role in helping refiners meet fuel standards, better managing operational efficiency, enhancing conversion and selectivity, and in keeping pace with the changing clean fuel trends. New levels of flexibility are required in refinery processes as products demand change and the availability of specific crudes is altered. As petroleum is predicted to remain the most important single resource for transportation by 2050, the development of new refinery technologies and catalysts is expected to be of utmost importance in the coming future.

The refinery catalysts comprises following subgroups:

FCC

Hydrotreating

Hydrocracking

Alkylation

Others

The FCC catalysts play a very important role in conversion of heavy atmospheric residues and vacuum distillates into fractions of motor fuels, mainly gasoline. Hydrotreating catalysts are used in petroleum refining in order to remove contaminants such as oxygen, nitrogen, sulfur, and metals from liquid petroleum fractions. The objective of hydrocracking catalysts is to convert heavy oil feedstock into high-quality, lighter fuel products such as naphtha, gasoline, jet or kerosene, and diesel, and hydrowax which can be used as petrochemical plant lube basestock or feedstock.

The global market for refinery catalysts has witnessed a decent growth in the last five years. This growth can be attributed to surging demand for energy and growing refinery capacities. The global refinery catalysts market which majorly includes fluid catalytic cracking catalysts and hydroprocessing catalysts has witnessed high growth in last five years. This market is projected to reach XX KT by 2019, at a CAGR of XX% between 2014 and 2019. North America accounts for the major share in overall refinery catalysts due to huge refinery capacities and increasing energy demand in the region.

Some of the drivers identified for the industry are stringent environmental regulations, rising consumption of petroleum-based derivatives, and demand for maintaining high octane number. The restraining factors are identified as diminishing crude oil reserves, and high cost of production. Backward integration by refinery catalysts manufacturers can serve as an opportunity during the forecast period.

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