

Petroleum Refining Additives Market Forecasts to 2034 – Global Analysis By Additive Type (Corrosion Inhibitors, Antioxidants, Demulsifiers, Deposit Control Additives, Flow Improvers, Metal Deactivators and Octane Improvers), Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Petroleum Refining Additives Market is accounted for \$1.2 billion in 2026 and is expected to reach \$1.9 billion by 2034 growing at a CAGR of 6.0% during the forecast period. Petroleum refining additives are chemical agents incorporated into refining operations to boost fuel characteristics, streamline processes, and lower environmental harm. Common types include corrosion preventers, antioxidants, demulsifiers, and metal deactivators, all of which help safeguard equipment and ensure stable output. These substances assist in removing or controlling contaminants like sulfur and nitrogen, enabling compliance with strict fuel regulations. They also enhance processing efficiency, prolong catalyst usability, and reduce operational interruptions. With the growing emphasis on cleaner energy, such additives have become vital for refineries striving for better efficiency, consistent product quality, and adherence to evolving environmental and industry standards.

According to the U.S. Environmental Protection Agency (EPA), Tier 3 gasoline standards (effective 2017) require sulfur content below 10 ppm, which directly increases the use of desulfurization catalysts, corrosion inhibitors, and antifoulants in petroleum refining.

Market Dynamics:

Driver:

Rising demand for cleaner fuels

Growing environmental concerns worldwide are increasing the need for cleaner fuel options, thereby accelerating the use of petroleum refining additives. Strict government regulations aimed at lowering emissions require fuels with minimal sulfur and nitrogen levels. Additives help refineries meet these requirements by enhancing fuel cleanliness and performance. With rapid urban and industrial expansion, particularly in emerging economies, the demand for eco-friendly fuels continues to climb. This shift encourages refineries to incorporate advanced additive technologies to maintain compliance, improve fuel standards, and strengthen their position in a competitive and sustainability-focused market environment.

Restraint:

Stringent environmental and safety regulations

Strict environmental and safety policies can hinder the petroleum refining additives market by imposing limitations on chemical usage and increasing compliance costs. Manufacturers are required to invest significantly in developing environmentally friendly alternatives, which often leads to higher product prices. Regulations may also restrict certain effective substances, reducing available options for refiners. The complexity of meeting evolving standards slows down product development and approval processes. These factors collectively create obstacles for market expansion by raising operational expenses, restricting formulation choices, and making it more challenging for companies to introduce new additive technologies.

Opportunity:

Technological innovations in additive formulations

Ongoing progress in chemical and material technologies is opening new avenues for the petroleum refining additives market. Advanced additive formulations are being designed to deliver superior performance, lower environmental impact, and better integration with modern refining systems. These innovations enhance operational efficiency, extend catalyst lifespan, and improve overall stability. As refineries upgrade their processes, the demand for high-quality and specialized additives continues to rise. Businesses focusing on research and innovation can leverage this opportunity by

developing unique solutions that address changing industry needs and strengthen their competitive position.

Threat:

Rapid transition to electric vehicles

The growing adoption of electric vehicles represents a major challenge for the petroleum refining additives market. As more consumers shift to EVs, the reliance on traditional fuels such as petrol and diesel decreases, leading to reduced demand for refining activities. Government incentives and environmental policies are further encouraging this transition. With declining fossil fuel consumption, refineries may operate at lower capacities, impacting additive usage. This ongoing transformation in mobility trends threatens the long-term expansion of the market by reducing the need for petroleum-based products and related chemical solutions.

Covid-19 Impact:

The outbreak of COVID-19 adversely affected the petroleum refining additives market by significantly reducing fuel consumption and interrupting supply networks. Restrictions on travel, industrial shutdowns, and limited mobility caused a steep drop in demand for petroleum products, leading refineries to scale down operations. This resulted in decreased usage of refining additives. Furthermore, disruptions in logistics and labour availability impacted production and supply chains. As economic activities resumed, the market started recovering alongside rising fuel demand. The situation emphasized the importance of efficiency, prompting refineries to increasingly rely on advanced additives to enhance productivity and control operational costs.

The deposit control additives segment is expected to be the largest during the forecast period

The deposit control additives segment is expected to account for the largest market share during the forecast period because of their importance in keeping fuel systems clean and efficient. They help inhibit the build-up of deposits in critical engine components such as injectors and combustion chambers, promoting better fuel delivery and combustion. Their extensive application in both gasoline and diesel fuels makes them vital for achieving current engine efficiency and emission standards. Refineries rely on these additives to improve fuel performance, minimize operational issues, and extend engine life, reinforcing their position as the most prominent segment in the

market.

The aviation fuel refining segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the aviation fuel refining segment is predicted to witness the highest growth rate, supported by the strong rebound and expansion of the aviation industry. Rising passenger traffic, growing air cargo demand, and fleet modernization are increasing the consumption of aviation fuels. Additives are essential for maintaining fuel quality, improving stability, and ensuring safe performance in demanding environments. With stricter regulations governing aviation fuel standards, refineries are focusing on advanced additive technologies to meet these requirements. This growing reliance on high-quality additives is driving rapid expansion within the aviation fuel refining segment.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share owing to its vast refining infrastructure and strong demand for fuels. Expanding industrial activities, urban growth, and increasing transportation requirements in major economies such as China and India are boosting fuel usage. The presence of large and advanced refineries drives consistent demand for additives to enhance operational performance and meet quality standards. Ongoing investments in refinery expansion and upgrades further reinforce the region's leadership. Moreover, stricter environmental norms are promoting the use of advanced additive solutions.

Region with highest CAGR:

Over the forecast period, the Rest of the World (RoW) region is anticipated to exhibit the highest CAGR, driven by significant investments in refinery expansion and modernization. Governments are focusing on enhancing downstream capabilities to increase economic value from oil resources. Rising demand for cleaner and high-performance fuels, along with growing export potential, is boosting the use of refining additives. Furthermore, the need to comply with global fuel quality standards is encouraging the adoption of advanced solutions. These factors collectively contribute to the region's rapid market growth and increasing importance in the global refining industry.

Key players in the market

Some of the key players in Petroleum Refining Additives Market include BASF SE, Evonik Industries AG, Innospec Inc., TotalEnergies SE, Lubrizol Corporation, Dow Inc., Clariant AG, Dorf Ketal Chemicals, Afton Chemical, Baker Hughes Company, Chevron Corporation, Infineum International Limited, Nalco Champion (Ecolab), Lanxess AG, NewMarket Corporation, Croda International Plc, Arkema SA and Huntsman Corporation.

Key Developments:

In April 2026, TotalEnergies and Masdar have signed a binding agreement to establish a \$2.2 billion joint venture aimed at expanding renewable energy capacity in nine countries across Asia. The joint venture will have a portfolio capacity of 3 GW of operational assets and 6 GW of assets in advanced development, which are expected to be operational by the end of the decade.

In October 2025, BASF SE and ANDRITZ Group have signed a license agreement for the use of BASF's proprietary gas treatment technology, OASE® blue, in a carbon capture project planned to be implemented in the city of Aarhus, Denmark. The project aims to capture approximately 435,000 tons of CO₂ annually from the flue gases of a waste-to-energy plant for sequestration; the city of Aarhus has set itself the goal of becoming CO₂-neutral by 2030.

In March 2025, Evonik has entered into an exclusive agreement with the Cleveland-based Sea-Land Chemical Company for the distribution of its cleaning solutions in the U.S. The agreement builds on a long-standing relationship with the distributor and expands the reach of Evonik's cleaning solutions to the entire U.S. region.

Additive Types Covered:

Corrosion Inhibitors

Antioxidants

Demulsifiers

Deposit Control Additives

Flow Improvers

Metal Deactivators

Octane Improvers

Applications Covered:

Gasoline Refining

Diesel Refining

Aviation Fuel Refining

Marine Fuel Refining

Heavy Fuel Oil Refining

End Users Covered:

Integrated Oil & Gas Companies

Independent Refiners

Petrochemical Complexes

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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