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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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World Refinery Chemicals

Industry Study with Forecasts for **2013 & 2018**

Study #2570 | December 2009 | \$5700 | 341 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
Macroeconomic Outlook	7
World Population Outlook	11
World Motor Vehicle Park	13
World Crude Oil Consumption Outlook	15
Refinery Overview	18
Refinery Process Overview	18
World Petroleum Refining Outlook	20
Environmental & Regulatory Issues	23
Chemical Pricing Trends	27

REFINERY CHEMICAL APPLICATIONS

General	29
Conversion Processes	32
Alkylation	34
Technology	34
Chemical Demand	35
Hydrocracking	39
Technology	39
Chemical Demand	41
Catalytic Cracking	43
Technology	43
Chemical Demand	44
Other Conversion Processes	47
Technology	47
Chemical Demand	49
Petroleum Treatment Processes	53
Hydrotreating	55
Technology	55
Chemical Demand	55
Other Treatment Processes	58
Technology	58
Chemical Demand	61
Water Treatment	66
Other Refinery Applications	71
Technology	71
Chemical Demand	72

REFINERY CHEMICAL PRODUCTS

General	74
Merchant Hydrogen	77
Catalysts	81
Zeolites	84
Metal Catalysts	86
Other Catalysts	91
pH Adjusters	94
Corrosion Inhibitors	96
Other Refinery Chemicals	99

NORTH AMERICA

Economic Overview	104
Refinery Chemical Demand	106
United States	109
Canada	115
Mexico	119

WESTERN EUROPE

Economic Overview	125
Refinery Chemical Demand	127
Germany	130
Italy	135
France	139
United Kingdom	144
Netherlands	148
Spain	153
Other Western Europe	157

ASIA/PACIFIC

Economic Overview	162
Refinery Chemical Demand	165
Japan	168
China	174
South Korea	180
India	185
Singapore	191
Taiwan	195
Other Asia/Pacific	200

OTHER REGIONS

Latin America	207
Brazil	211
Venezuela	216
Other Latin America	220
Eastern Europe	225
Russia	231
Other Eastern Europe	235
Africa/Mideast	240
Saudi Arabia	246
Iran	250
Other Africa/Mideast	254

INDUSTRY STRUCTURE

General	260
Market Share	263
Competitive Strategies	268
Mergers & Acquisitions	270
Cooperative Agreements	273
Research & Development	278

COMPANY PROFILES

Air Products and Chemicals	281
Akzo Nobel	285
Albemarle Corporation	286
Baker Hughes	290
BASF SE	291
BJ Services	295

Chevron Corporation	296
China Petroleum & Chemical	298
Clariant International	300
Dow Chemical	302
DuPont (EI) de Nemours	306
Exxon Mobil	307
General Electric	309
Grace (WR) & Company	311
Haldor Topsoe	313
Honeywell International	315
Institut Francais du Petrole	318
Johnson Matthey	320
Kuwait Catalyst	322
L'Air Liquide	323
Linde AG	326
Nalco Holding	330
Praxair Incorporated	332
Reliance Industries	336
Royal Dutch Shell	337
Sued-Chemie AG	339

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 World Motor Vehicle Park by Region	15
4 World Crude Oil Consumption	17
5 World Refined Petroleum Product Output by Region	22

REFINERY CHEMICAL APPLICATIONS

1 World Refinery Chemical Demand by Application & Region	31
Cht World Refinery Chemical Demand by Application, 2008	32
2 World Conversion Processes Chemical Demand by Application & Region	34
3 World Alkylation Chemical Demand by Type & Region	39
4 World Hydrocracking Chemical Demand by Type & Region	43
5 World Catalytic Cracking Chemical Demand by Type & Region	47
6 World Other Conversion Processes Chemical Demand by Application, Type & Region	52
7 World Petroleum Treatment Processes Chemical Demand by Application & Region	54
8 World Hydrotreating Chemical Demand by Type & Region	58

(continued on following page)

List of Tables/Charts

(continued from previous page)

9	World Other Treatment Processes Chemical Demand by Application, Type & Region	65
10	World Water Treatment Processes Chemical Demand by Application, Product & Region	70
11	World Other Refinery Applications Chemical Demand by Type & Region	73

REFINERY CHEMICAL PRODUCTS

1	World Refinery Chemical Demand by Product & Region	76
Cht	World Refinery Chemical Demand by Product, 2008	77
2	World Hydrogen Demand in Refining by Application & Region	80
3	World Refinery Catalyst Demand by Type, Application & Region	83
4	World Zeolite Catalyst Demand by Application & Region	86
5	World Metal Catalyst Demand by Application & Region	90
6	World Other Refinery Catalyst Demand by Type, Application & Region	93
7	World pH Adjusters Demand by Application & Region	95
8	World Corrosion Inhibitors Demand in Refining by Application & Region	98
9	World Other Refinery Chemicals Demand by Application & Region	103

NORTH AMERICA

1	North America: Key Indicators for Refinery Chemical Demand	106
2	North America: Refinery Chemical Demand by Country, Application & Product	108
Cht	North America Refinery Chemical Demand, 2008	109
3	United States: Key Indicators for Refinery Chemical Demand	112
4	United States: Refinery Chemical Demand by Application & Product	114
5	Canada: Key Indicators for Refinery Chemical Demand	117
6	Canada: Refinery Chemical Demand by Application & Product	119
7	Mexico: Key Indicators for Refinery Chemical Demand	122
8	Mexico: Refinery Chemical Demand by Application & Product	124

WESTERN EUROPE

1	Western Europe: Key Indicators for Refinery Chemical Demand	127
---	---	-----

2	Western Europe: Refinery Chemical Demand by Country, Application & Product	129
Cht	Western Europe Refinery Chemical Demand, 2008	130
3	Germany: Key Indicators for Refinery Chemical Demand	132
4	Germany: Refinery Chemical Demand by Application & Product	134
5	Italy: Key Indicators for Refinery Chemical Demand	137
6	Italy: Refinery Chemical Demand by Application & Product	139
7	France: Key Indicators for Refinery Chemical Demand	141
8	France: Refinery Chemical Demand by Application & Product	143
9	United Kingdom: Key Indicators for Refinery Chemical Demand	146
10	United Kingdom: Refinery Chemical Demand by Application & Product	148
11	Netherlands: Key Indicators for Refinery Chemical Demand	150
12	Netherlands: Refinery Chemical Demand by Application & Product	153
13	Spain: Key Indicators for Refinery Chemical Demand	155
14	Spain: Refinery Chemical Demand by Application & Product	157
15	Other Western Europe: Key Indicators for Refinery Chemical Demand	159
16	Other Western Europe: Refinery Chemical Demand by Application & Product	161

ASIA/PACIFIC

1	Asia/Pacific: Key Indicators for Refinery Chemical Demand	165
2	Asia/Pacific: Refinery Chemical Demand by Country, Application & Product	167
Cht	Asia/Pacific Refinery Chemical Demand, 2008	168
3	Japan: Key Indicators for Refinery Chemical Demand	171
4	Japan: Refinery Chemical Demand by Application & Product	173
5	China: Key Indicators for Refinery Chemical Demand	177
6	China: Refinery Chemical Demand by Application & Product	180
7	South Korea: Key Indicators for Refinery Chemical Demand	183
8	South Korea: Refinery Chemical Demand by Application & Product	185
9	India: Key Indicators for Refinery Chemical Demand	188
10	India: Refinery Chemical Demand by Application & Product	190
11	Singapore: Key Indicators for Refinery Chemical Demand	193
12	Singapore: Refinery Chemical Demand by Application & Product	195
13	Taiwan: Key Indicators for Refinery Chemical Demand	198

14	Taiwan: Refinery Chemical Demand by Application & Product	200
15	Other Asia/Pacific: Key Indicators for Refinery Chemical Demand	203
16	Other Asia/Pacific: Refinery Chemical Demand by Application & Product	206

OTHER REGIONS

1	Latin America: Key Indicators for Refinery Chemical Demand	209
2	Latin America: Refinery Chemical Demand by Country, Application & Product	211
3	Brazil: Key Indicators for Refinery Chemical Demand	214
4	Brazil: Refinery Chemical Demand by Application & Product	216
5	Venezuela: Key Indicators for Refinery Chemical Demand	218
6	Venezuela: Refinery Chemical Demand by Application & Product	220
7	Other Latin America: Key Indicators for Refinery Chemical Demand	223
8	Other Latin America: Refinery Chemical Demand by Application & Product	225
9	Eastern Europe: Key Indicators for Refinery Chemical Demand	228
10	Eastern Europe: Refinery Chemical Demand by Country, Application & Product	230
11	Russia: Key Indicators for Refinery Chemical Demand	233
12	Russia: Refinery Chemical Demand by Application & Product	235
13	Other Eastern Europe: Key Indicators for Refinery Chemical Demand	238
14	Other Eastern Europe: Refinery Chemical Demand by Application & Product	240
15	Africa/Mideast: Key Indicators for Refinery Chemical Demand	243
16	Africa/Mideast: Refinery Chemical Demand by Country, Application & Product	245
17	Saudi Arabia: Key Indicators for Refinery Chemical Demand	248
18	Saudi Arabia: Refinery Chemical Demand by Application & Product	250
19	Iran: Key Indicators for Refinery Chemical Demand	252
20	Iran: Refinery Chemical Demand by Application & Product	254
21	Other Africa/Mideast: Key Indicators for Refinery Chemical Demand	256
22	Other Africa/Mideast: Refinery Chemical Demand by Product & Application	259

INDUSTRY STRUCTURE

1	World Refinery Chemical Sales by Company, 2008	261
Cht	Refinery Chemicals Market Share, 2008	265
2	Selected Acquisitions & Divestitures	272
3	Selected Cooperative Agreements	276

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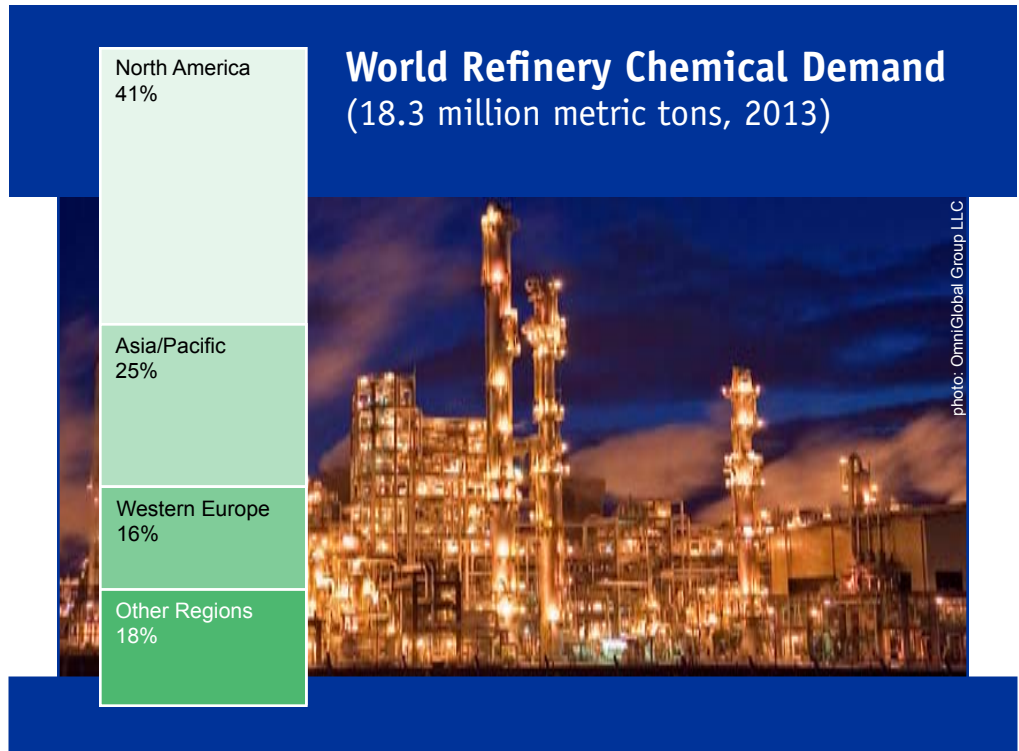
Increasingly chemical-intensive refinery processes will be driven by refiners seeking to meet tightening environmental standards while boosting yields of gasoline and diesel fuel.

Global demand to rise 3.5% yearly through 2013

World demand for chemicals used in petroleum refineries is forecast to advance at a 3.5 percent annual pace to 18.3 million metric tons in 2013, valued at \$26.8 billion. Increased refinery chemical usage will be driven by continued investment in chemically-intensive conversion and petroleum treatment processes, as refiners seek to meet tightening environmental standards while boosting yields of gasoline and diesel fuel. Underlying these gains will be a modest expansion in refinery output, which will be restrained by a slow global economy and elevated crude oil prices.

pH adjusters, corrosion inhibitors to outpace catalyst applications

Catalysts are widely used to improve energy efficiency and process productivity in petroleum treatment and conversion applications. Catalytic cracking and hydroprocessing represent the highest value markets for catalysts, primarily employing zeolite and metal catalysts, respectively. Although the largest application in volume terms is alkylation, its impact in value terms is relatively small as the process typically utilizes low-value sulfuric acid catalyst. Demand growth for pH adjusters and corrosion inhibitors is expected to outpace that for catalysts through 2013, with gains primarily driven by increases in refinery output and internal water recycling.



Hydrogen to claim most new product demand

Environmental regulations aimed at reducing motor fuel sulfur levels will drive chemical use in petroleum treatment applications, particularly hydrotreating processes. Refiners will also expand their use of hydrocracking and isomerization to upgrade an increasingly heavy crude oil stream into valuable lighter refined products. Hydroprocessing and isomerization units consume large volumes of hydrogen, and as hydrogen needs exceed that supplied as a byproduct from catalytic reforming, refiners will increasingly turn to merchant hydrogen, which is expected to account for the bulk of the increase in refinery chemical consumption through 2013.

Asia/Pacific, Africa/Mideast regions to lead gains

North America is the largest regional consumer of refinery chemicals, due to high levels of chemical use in the advanced refineries of the US and Canada. Through 2013, chemical growth in North America and Western Europe will be restrained by decreasing refinery output as less profitable refineries are closed. Significantly faster gains in refinery chemical consumption are expected in the Asia/Pacific and Africa/Mideast regions, with demand boosted by both rising refinery throughput and the increased adoption of catalytic refining processes.

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Sample Text, Table & Chart

WESTERN EUROPE

France: Refinery Chemical Demand

Demand for refinery chemicals in France is forecast to increase by 1.5 percent per year through 2013, up from 1.0 percent in 2009. Demand increased sharply over the 2000s as a result of refinery output, as a result of a steady increase in refinery output and the accompanying rise in chemical demand. Demand will decelerate through 2013, with demand in hydroprocessing applications as refinery output declines.

Most of the increased chemical use in France's hydroprocessing units will be for merchant hydrogen, which is also expected to expand use in isomerization processes. Catalyst consumption will increase in hydroprocessing applications, while falling in alkylating and catalytic cracking units due to a modest decline in hydrocarbon output. Demand for pH adjusters, corrosion inhibitors and other chemicals is expected to remain generally static, with modest increases in consumption per barrel of output offset by decreasing refined products output.

Producers of catalysts in France include Institut Francais du Petrole (IFP). Through its Axens subsidiary, the company is a provider of catalysts and other products, processes and services for the refining, petrochemical, chemical and gas industries. Axens also makes adsorbents used in refineries. IFP's catalyst operations also include Eurecat, a joint venture with US-based Albemarle that conducts catalyst regeneration and recycling services.

France is home to the world's largest supplier of industrial gases, L'Air Liquide. The company supplies hydrogen, nitrogen and other gases to refiners in France and elsewhere in Europe via its Northern Europe pipeline network, which is approximately 3,500 kilometers in length.

142

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SAMPLE
TEXT

TABLE VI-8

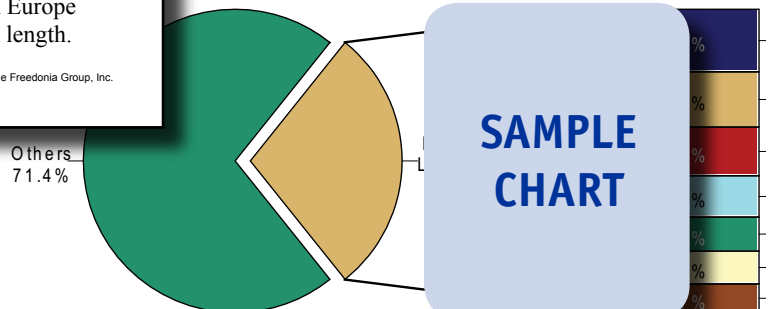
FRANCE: REFINERY CHEMICAL DEMAND
BY APPLICATION & PRODUCT
(000 metric tons)

Item	1998	2003	2008	2013	2018
Refinery Output (mil metric tons)					
kg chemical/metric ton output					
Refinery Chemical Demand					
By Application:					
Conversion					
Petroleum Treatment					
Water Treatment					
Other					
By Product:					
Merchant Hydrogen					
Catalysts					
pH Adjusters					
Corrosion Inhibitors					
Other Chemicals					
% France					
W Europe Refinery Chem Demand	16				20

SAMPLE
TABLE

CHART IX-1

REFINERY CHEMICALS MARKET SHARE, 2008
(\$20.6 billion)

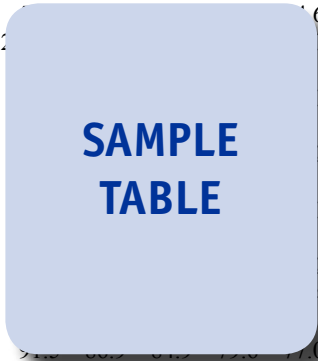


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-7
FRANCE: KEY INDICATORS FOR REFINERY CHEMICAL DEMAND

Item	1998	2003	2008	2013	2018
Population (mil persons)	62.0	63.0	64.0	65.0	66.0
GDP/capita	22,000	24,000	26,000	28,000	30,000
Gross Domestic Product (bil 2007\$)	1,300	1,500	1,700	1,900	2,100
Motor Vehicles in Use (million units)	18.0	19.0	20.0	21.0	22.0
Crude Oil Consumption (mil bbl)	1,800	1,700	1,600	1,500	1,400
Petroleum Refineries (units) mil metric tons output/refinery	100	95	90	85	80
Refinery Output (mil metric tons)	1,800	1,700	1,600	1,500	1,400



COMPANY PROFILES

Kuwait Catalyst Company
 Shuaiba West Industrial Area
 Block 62, Area Number Two
 Shuaiba 65453
 Kuwait
 965-2326-2091
<http://www.kcc.com>

Annual Sales:
 Employment:
 Key Products:



Kuwait Catalyst Company is a leading manufacturer of proprietary hydrotreating catalysts for use in crude oil refineries. The privately held company is owned by a group of local and international investors.

The Company makes and sells catalysts for refinery end uses via the HOP 600, HOP 800, HOP 400 and HOP 500 series. Kuwait Catalyst's HOP 600 series comprises atmospheric residue and vacuum residue desulfurization catalysts for activity graded loading and demetallation applications. Catalysts in this line feature a high metal tolerance and dual-type pore size distribution. Catalysts in the HOP 800 series are high metal performance desulfurization types that also feature high denitrification and cracking properties. Catalysts in the HOP 400 and HOP 500 series are designed for vacuum gas oil hydrotreating and mild hydrocracking, naphtha, kerosene and diesel fuel applications. These catalysts feature high desulfurization, denitrification and cracking properties.

Additionally, the Company offers such technical services as reactor appraisals for catalyst profiles, catalyst loading and sulfiding, pilot

"Although France is a major center for petroleum refining, the industry's output is in decline. As with much of France's economy, the refining sector has been hindered in recent years by the country's insistence on maintaining labor and social service policies established in the latter half of the 20th century. Despite decreasing refinery output over the past decade, France still accounted for twelve percent of Western Europe's refinery chemical consumption in 2008, ..."
 --Section VI, pg. 139-40

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OTHER STUDIES

World Hydrogen

This study analyzes the world market for merchant hydrogen. It presents historical demand data for the years 1998, 2003 and 2008 and forecasts for 2013 and 2018 by hydrogen application (e.g., petroleum refining, chemical manufacturing), world regional market (e.g., North America, Western Europe, Asia/Pacific), and for 15 major national markets. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2605 02/2010 \$5300

Oilfield Chemicals

US oilfield chemical demand will grow 4.4% annually through 2013. The market will decline in the short term then rebound by the end of the forecast period, based mainly on swings in oil and gas prices. Stimulation chemicals and EOR products will be the fastest growing segments. Acids and polymers used in stimulation fluids will see growth. This study analyzes the US oilfield chemical industry, with forecasts for 2013 and 2018 by product and raw material. It also evaluates company market share and profiles industry players.

#2546 09/2009 \$4800

World Enzymes

Global enzyme demand will rise 6.3% yearly through 2013, driven by strong demand in the specialty enzymes segment and good growth in animal feed and ethanol markets. North America and Western Europe will see healthy market gains while the fastest growth remains in developing countries. This study analyzes the \$5.1 billion world enzyme industry, with forecasts for 2013 and 2018 by product, market, world region and for 16 countries. It also evaluates market share and profiles industry players.

#2506 08/2009 \$5800

Industrial Gases

Total US industrial gas demand, including some captive consumption, will grow 4.9% annually through 2013. The petroleum and natural gas industry will remain the dominant and fastest growing market, driven by the massive amounts of hydrogen needed to produce cleaner-burning fuels from increasingly impure crude oil, as required by law. This study analyzes the \$14.3 billion US industrial gas industry, with forecasts for 2013 and 2018 by market and product. It also evaluates market share and profiles industry players.

#2460 03/2009 \$4700

Specialty Fuel Additives

US demand for specialty additives used in gasoline and other fuels will grow 2.9% annually through 2012. Above average growth for deposit control agents--the largest segment--will continue to support the market. Corrosion inhibitors and additives used in diesel fuel such as cold flow improvers will show the fastest growth. This study analyzes the \$1.1 billion US specialty fuel additives industry, with forecasts for 2012 and 2017 by type, application and market. It also evaluates market share and profiles industry players.

#2440 01/2009 \$4500

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