

World Refining Catalysts

Industry Study with Forecasts for 2020 & 2025

Study #3444 | August 2016 | \$6000



Rising incomes, vehicle ownership fuel gains in developing economies

In developing economies, rising per capita incomes and increasing rates of vehicle ownership have resulted in large gains in demand for motor vehicle fuels. The growth of manufacturing and the related need to transport goods have also supported growth in demand for vehicle fuels. As a result, refined products output is expected to expand through the forecast period, supporting overall healthy gains in demand for refining catalysts.

Environmental regulations will also have a strong impact on the refining catalyst market. The implementation of fuel sulfur regulations to address air pollution will drive demand for hydrotreating catalysts, while reforming catalysts will benefit from the increasing production of higher-octane gasoline for use in more fuel-efficient engines.

Refining catalyst producers face strong competition

The refining catalyst markets in developed countries are mature, with strong competition among catalyst manufacturers. To maintain and expand market share in these countries, manufacturers invest significant time and resources into the development of better catalysts with performance at higher temperatures and pressures, lower

costs via increased crude oil feed rate or longer catalyst life, and higher quality end products. This continued introduction of new catalysts will sustain minor growth in the mature markets of North America, Western Europe, and Japan.

Challenges to growth

The established nature of fuel sulfur regulations in developed countries, declining gasoline consumption, and decreasing refined products output will restrain stronger gains. In addition, the changing nature of the global crude oil supply, particularly the increased availability of tight oil crudes that are lower in sulfur content, may restrain growth in hydrotreating catalyst consumption in more developed markets. Opportunities will exist, though, for catalysts that allow refiners flexibility in responding to the changing nature of the crude oil supply.

Study coverage

This study analyzes the global refining market industry. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) for supply and demand by application (fluid catalytic cracking, hydroprocessing, alkylation, reforming, other) and material (metal, acid, zeolites) in six regions and 21 countries. The study also examines key market environment factors, assesses the industry structure and evaluates company market share.

World Refining Catalysts

Industry Study with historical data for 2005,
2010 & 2015 plus forecasts for 2020 & 2025

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OVERVIEW

Zeolites

percent annual demand, demand will increase in the same year. Zeolites are used as catalytic cracking and other applications. Demand can be dependent on various factors in regions with growth, such as the Asia-Pacific region for fluid catalytic cracking. In 2011 due to the rise in oil prices at peak, zeolite catalysts and rare earth supplies were added globally. Going forward, continuing investment by zeolite catalyst manufacturers into research and development will support healthy growth in zeolite catalyst prices.

Zeolites are aluminosilicates, that is, porous, crystalline substances composed of silicon and aluminum, and frequently also contain sodium, calcium, rare earths, or other elements chosen to enhance their catalytic performance. The value of zeolites as catalysts lies in their cage-like structure consisting of exterior pores and interior channels. By manipulating the geometry of these pores, different molecules can be allowed inside or kept outside of the zeolite. In this way, a zeolite can restrict the types of chemical reactions taking place, preventing the formation of unwanted byproducts.

Fluid catalytic cracking applications account for the majority of catalytic zeolite uses. Zeolites are also frequently used in combination with other catalytic substances, such as platinum, with which they also function as both a catalyst and a catalyst support. In addition, zeolites

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WORLD ALKYLATION CATALYST DEMAND BY TYPE & REGION (million dollars)

Item	2005	2010	2015	2020	2025
Refined Products Prdn (mil metric tons) m ton catalyst/000 m ton refined prdts					
Alkylation Catalysts (000 metric tons) \$/metric ton					
Alkylation Catalyst Demand By Material: Sulfuric Acid Hydrofluoric Acid By Region: North America Western Europe Asia/Pacific Central & South America Eastern Europe Africa/Mideast					
% alkylation Refining Catalyst Demand					

Source: The Freedonia Group

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JAPAN: REFINING CATALYST DEMAND BY APPLICATION (million dollars)

Item	2005	2010	2015	2020	2025
Refined Products Prdn (mil metric tons) m ton catalyst/mil m ton refined prdts					
Refining Catalyst Demand (000 m ton) \$/metric ton					
Refining Catalyst Demand Hydroprocessing Fluid Catalytic Cracking Alkylation Reforming Other					
% Japan Asia/Pacific Catalyst Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

Solvents

US demand for solvents is forecast to rise just over one percent per year through 2020 to 9.6 billion pounds. Environmental regulations will continue to drive a shift toward less hazardous solvents. Public perception and consumer preference will also favor green products derived from renewable sources such as soy methyl ester and terpenes. This study offers historical demand data as well as forecasts for 2020 and 2025 by product and market. The study also considers market environment factors, details company market share and profiles US industry competitors.
#3429..... July 2016 \$5300

Lubricants

US demand for lubricants will rise slightly to 2.4 billion gallons in 2020, with a value of \$23.5 billion. As most products move toward higher-quality lubricants, transmission fluids, gear oils, and engine oils will be affected by the lengthening drain intervals associated with improvement in fluid technology. This study presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by basestock, formulation, product and market. The study also considers key market environment factors, evaluates company market share and profiles US industry competitors.
#3394..... April 2016 \$5400

World Lubricants

World demand for lubricants will rise 2.0 percent annually to 45.4 million metric tons in 2019. Growth will be supported by increasing demand for engine oils in new motor vehicles, but will be tempered by longer drain intervals that slow the engine oil aftermarket. The Asia/Pacific market will grow the fastest. This study analyzes the 41.1 million metric ton world lubricant industry, with forecasts for 2019 and 2024 by formulation, product and market for six world regions and 23 major countries. The study also evaluates company market share and profiles industry players.
#3364..... December 2015 \$6500

World Catalysts

World demand for catalysts will grow 4.8 percent per year to \$20.6 billion in 2018. Growth will be led by a rebound in the chemical and polymer industries, most notably in developed economies hit hard by the recession. The fastest advances, however, will occur in developing areas such as the Asia/Pacific and Africa/Mideast regions. This study analyzes the \$16.3 billion world catalyst industry, with forecasts for 2018 and 2023 by material, type, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry players.
#3217..... December 2014 \$6500

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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