

21st BIENNIAL EDITION

## THE INTELLIGENCE REPORT

Business Shifts in the Global Catalytic  
Process Industries, 2025-2031

WE DELIVER  
RESULTS!

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Leading-edge Analyses and Guidance for  
Opportunity Identification and Strategic Investment

### Energy Transition Impacts

#### Towards Net-Zero

TCGR's 2025 edition will quantify the impact of the energy transition on catalyst markets like refining, syngas, polymers and plastic recycling, and automotive catalysis. Increased opportunities have been created for new catalytic feedstock upgrading technologies, replacing thermal processes with electrified reactors, new biological and enzymatic pathways, and closing the loop on carbon.

Leveraging improvements made in the last edition, the 2025 "Intelligence Report" continues its well-established and recognized coverage of traditional catalyst markets and landscape, but expands details to include energy transition, renewables, and circularity. This refreshed report will deliver:

- insightful, actionable messages and takeaways in a revamped executive summary
- more granular data analyses and deeper competitive market insights
- historical and future projections into traditional and new growth areas for catalysis

Number of catalyst industry segments covered in this edition of the study. No one knows the catalyst business by application, by producer like TCGR.

100+

\$2+  
Trillion

Value of products produced from catalysis. Catalysis remains the lifeblood of chemical transformations, the key that unlocks your value proposition.

### True to its "Gold Standard" Roots

The 2025 edition will build upon more than 40 years of continuity in TCGR's reports and models. A more streamlined read, providing users with a greater understanding of TCGR's assumptions and projections. Perspectives on new markets and competitive positioning within the industry, providing subscribers the same value they have grown to know and trust over decades.

### Special Feature

#### Future of Hydrogen Deep-Dive: Sources and Applications in the Energy Transition

Hydrogen supply/demand and growth is critical to meet future energy transition solutions, whether grey, blue turquoise or green hydrogen. Historically, data produced from IEA and The Hydrogen Council estimating current consumption of around 93 MIL mt/yr in 2023 growing to 240 MIL mt/yr by 2035 and 45-500 MIL mt/yr is under-reported because hydrogen consumption outside of the industrial gases industry, involving chemicals, food, environmental and power production supplied by alternative producers (e.g. Caloric, others) is not being accurately reported. This section will provide deeper analyses by application in refining, chemicals, polymers, specialty chemicals, food, environmental and power generation (co-firing). In addition, the sources of hydrogen of different types and the economics will face different challenges and timelines. For example, electrolytic green hydrogen at \$US 6-9 kg is not ready for 100-300 MW scale-up yet based on cost/performance. **TCGR's Special Feature will document its own independent analyses for industry practitioners, those that need to make ROI investment decisions seriously and highlight the risks, timelines and range of conclusions needed to be reached by energy industry participants.** It's not just about hydrogen, its about the what, where, when and how it will be deployed in the future that industry needs a clearer technology roadmap for making decisions.

#### Key Study Differentiators:

Integrated and granular catalyst industry model, with implications reflected between segments (providing a holistic assessment of changes to the industry, including energy transition impacts), including:

- Impact on refining (FCC, hydrotreatment) and environmental (mobile emissions) catalysts due to transition to EVs and biofuel co-processing; growth in catalytic and separations materials due to batteries
- Impact on olefins (ethylene, propylene) due to plastics recycling as feedstock source, carbon circularity
- Impact on hydrogen, methanol, ammonia and syngas catalysts due to role as hydrogen carrier/LOHCs

#### Why subscribe to the "Intelligence Report"?

- Explicit coverage of emerging markets like electrolysis, biomass to fuels, chemicals and polymers, and recycled plastics
- Leverage of proprietary catalyst industry model, with electronically delivered data, supplemented by improved graphics that go deeper into market analyses
- A focus on a condensed report which will deliver essential report takeaways and risks to management
- TCGR's visionary stance continues to accurately project the market for catalysts and catalytic process technology

**SUBSCRIBE TO THE 2025 INTELLIGENCE REPORT TODAY!**



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