

Asia-Pacific Molecular Sieve - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Asia-Pacific Molecular Sieve Market size is estimated at USD 1.84 billion in 2025, and is expected to reach USD 2.41 billion by 2030, at a CAGR of 5.58% during the forecast period (2025-2030).

The COVID-19 pandemic had negatively impacted the market due to nationwide lockdowns, strict social distancing measures, and disruption in supply chains, which negatively affected the market for molecular sieves. The COVID-19 pandemic resulted in the closure of the oil and gas exploration activities and petroleum refining centers in China and India. It, thereby, affected the market demand for molecular sieves. However, post-COVID pandemic, the market recovered well after the restrictions were lifted. The market recovered significantly, owing to the rise in demand for molecular sieves in oil and gas, pharmaceutical, automotive, cosmetics, and detergent end-user industries.

Key Highlights

- The extensive application of molecular sieves as a catalyst in petroleum and petrochemical products and the rising awareness regarding the treatment of hazardous organic materials in the wastewater treatment industry is expected to drive the market for molecular sieves.
- The threat from chemical composites, enzymes, and other substitutes is expected to hinder market growth.
- FDA approval for usage in consumable items and the development of anti-microbial zeolite molecular sieves are expected to create opportunities for the market during the forecast period.
- China is expected to dominate the market and is also likely to witness the highest CAGR during the forecast period due to rising demand for molecular sieves in the oil and gas, automotive, and pharmaceutical industries.

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Oil and Gas End-User Industry Segment to Dominate The Market

- Molecular sieves are used in petroleum refining applications in the oil and gas industry. The molecular sieves are utilized in petrochemical applications such as ethylene, propylene, butadiene, and other feedstock dehydration and purification, cracked gas and liquid dehydration, naphtha feed dehydration, and drying hydrogen gas for acetylene converters.
- Zeolites are used as catalysts in refining crude oil into finished petroleum products. Zeolite catalysts are often the most efficient and cost-effective technique for converting refinery streams into high-octane gasoline blending stock due to their excellent selectivity.
- In the Asia-Pacific region, the oil production activities are increasing, further increasing the petroleum refining activities in the region. China is one of the largest markets for oil production in the region. According to the BP Statistical Review of World Energy, the country's oil production capacity is registered at 4,111 thousand barrels per day in 2022, as compared to 3994 thousand barrels per day in the year 2021.
- Similarly, in India, petroleum refining activities are increasing with the increasing oil production in the country. According to the BP Statistical Review, the country's oil production capacity is registered at 737 thousand barrels per day in the year 2022. Furthermore, the oil production volume is expected to increase in the coming years, thereby driving the demand for Molecular Sieves used in oil refining applications.
- Furthermore, according to the IBEF, India's oil and gas industry is expected to register a significant growth rate between 2023 and 2032, with the implementation of projects operated by Reliance Industries Limited and Oil and Natural Gas Corporation (ONGC). Thus, the implementation of oil and gas refinery projects in the coming years is expected to open new avenues for the industry.
- Owing to all these factors, the oil and gas end-user industry segment is expected to dominate the market for molecular sieves during the forecast period.

China to Dominate the Market

- China is expected to dominate the market for molecular sieves during the forecast period. The expansion of the oil and gas industry, along with significant growth in the industrial, automotive, cosmetics, and pharmaceutical industries, are likely to help propel the growth of the molecular sieve market in the country.
- China is the largest automotive vehicle manufacturer in the region. According to OICA (The Organisation Internationale des Constructeurs d'Automobiles), automotive vehicle production in China reached a total of 27.02 million units in 2022, an increase of 3% over the actual year for the same period.
- Moreover, the automobile industry in the country is witnessing switching trends as the consumer inclination toward battery-operated vehicles is on the higher side. Furthermore, the Chinese government estimated a 20% penetration rate of electric vehicle production by 2025. It is reflected in the electric vehicle sales trend in the country, which went to a record-breaking high in 2022. As per the China Passenger Car Association, the government sold 5.67 million EVs and plug-ins in 2022, touching almost double the sales figures achieved in 2021.
- In gas production, the country is witnessing increased production from different oilfields over the past few years. For instance, according to CNPC data, Tarim Oilfield, China's largest ultra-deep onshore oilfield, recorded production of 33.1 million tons (Mt) in 2022, which is up by 1.28 Mt from 2021. Similarly, as per Sinopec, the Fuling field produced 254 billion cubic feet (Bcf). That's up by roughly 1 Bcf as compared to 2021. According to the National Development and Reform Commission, currently, China holds 112,000 km of oil and gas pipelines. The plans are set to expand the current figure to 250,000 km in the next five years.
- Moreover, the pharmaceutical industry in China is also one of the largest in the world. The country produces generics,

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therapeutic medicines, active pharmaceutical ingredients, and traditional Chinese medicine. More than 90% of the drugs registered in the country are generic. The pharmaceutical industry in China is expected to reach CNY 3 trillion (USD 450 billion) in the coming years.

- Molecular Sieve is used as a cosmetic additive in various cosmetic products. In China, the cosmetics and personal care industry is one of the fastest-growing sectors. The country's personal care products market is projected to reach USD 80 billion by 2025, thereby driving the demand for molecular Sieve during the forecast period.
- Owing to the factors mentioned above, the market for molecular Sieves in China is projected to grow significantly during the study period.

Asia-Pacific Molecular Sieve Industry Overview

Asia-Pacific molecular sieve market is partially consolidated in nature. Some of the major players in the market include (not in any particular order) Arkema Group, Honeywell International Inc., Sorbead India, Tosoh Corporation, and W. R. Grace & Co.-Conn., among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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