

# Analysis of the Market for New Sulfur Recovery Technologies

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## ABSTRACT

The need for H<sub>2</sub>S removal & sulfur recovery technology is affected by several broad trends, including:

- World production rates for natural gas are expected to continue to increase for at least the next 20 years;
- Environmental regulations, which become more restrictive over time (including in Latin America), increasingly require sulfur recovery or other sulfur emission control technology; and,
- Future production of natural gas and other fossil fuels is expected to have more H<sub>2</sub>S than past production.

These factors mean that the need for H<sub>2</sub>S removal & sulfur recovery technology will grow steadily over at least the next 20 yrs. Current sales rates of H<sub>2</sub>S removal & sulfur recovery technology to natural gas customers are estimated at ~82 units/yr for medium-scale plants and ~50 units/yr for large-scale plants. These plant sales rates are expected grow by an average of approximately 2 to 3% per year over the next 20 yrs. Further, sales growth rates higher than this average are expected in Latin America due to the higher growth rate of natural gas production expected there.

This paper shows how publicly available data was used to estimate the size of the market for H<sub>2</sub>S removal & sulfur recovery from gas streams. In addition to estimating the number of technology sales, the paper discusses the geographic locations where technology is needed, and the potential break down of technology sales to various industries.