

Global Spherical Ammonium Perchlorate Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Spherical Ammonium Perchlorate competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Spherical ammonium perchlorate (SAP) is a refined form of ammonium perchlorate (AP) distinguished by its controlled spherical morphology, uniform particle size distribution, and superior flowability. Compared to irregular AP crystals, the spherical variant offers better packing density, higher combustion efficiency, and improved mechanical properties in composite solid propellants, making it especially critical for missile propulsion, space launch vehicles, and advanced solid rocket motors (SRMs). In 2024, global production of spherical ammonium perchlorate reached approximately 43.12 thousand tons, with an average global market price of around US\$7,029 per ton. The premium pricing reflects the high level of process control required, including secondary crystallization, sphericity optimization, and tricalcium phosphate (TCP)-based anti-caking coatings. These innovations reduce the risk of agglomeration during storage and enhance burning stability, ensuring consistency in demanding military and aerospace applications. The upstream production of SAP relies on core inputs such as perchloric acid, ammonia, and coating agents like TCP emulsions, with specialized crystallizers designed to optimize spherical particle formation. Leading producers include American Pacific (AMPAC, U.S.), Calibre Chemicals (India), Tianyuan Group (China), Gaojia Chemical (China), and Xiangxiang Zhujindu Electrochemical (China), all of which have invested in advanced crystallization and coating technology. Downstream, SAP's customer base is highly concentrated in the defense and aerospace sectors, where procurement follows strict certification and long qualification cycles. Key users include Ariane Group (Europe) for launch vehicle propellants, Norinco (China) for strategic missile systems, and U.S. contractors such as

Northrop Grumman and Anduril, the latter expanding SRM production with a facility in Mississippi aimed at delivering 6,000 tactical engines per year by 2026. Procurement is typically conducted via long-term government-backed contracts rather than open markets, with buyers prioritizing not just price but also particle consistency, storage stability, and defense compliance standards. Taiwan's NCSIST, for example, differentiates between imported U.S. AP with trace TCP additives and domestic Chinese AP without TCP, underscoring how moisture tolerance and anti-caking properties influence user preferences.

The global Spherical Ammonium Perchlorate market size was estimated at USD 303.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Spherical Ammonium Perchlorate market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Spherical Ammonium Perchlorate market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Spherical Ammonium Perchlorate market.

Global Spherical Ammonium Perchlorate Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the

overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

American Pacific
Calibre Chemicals
Tianyuan
Gaojia Chemical
Xiangxiang Zhujindu Electrochemical
Runfeng Chemical
Norinco
Eruca Technologies
Pandian Chemicals Limited
Ariane Group
Mesko

Market Segmentation (by Type)

90 ?m
200 ?m
400 ?m
Others

Market Segmentation (by Application)

Solid Propellant
Explosive Materials
Fireworks
Other

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Spherical Ammonium Perchlorate Market

Overview of the regional outlook of the Spherical Ammonium Perchlorate Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Spherical Ammonium Perchlorate Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Spherical Ammonium Perchlorate, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Spherical Ammonium Perchlorate
- 1.2 Key Market Segments
 - 1.2.1 Spherical Ammonium Perchlorate Segment by Type
 - 1.2.2 Spherical Ammonium Perchlorate Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 SPHERICAL AMMONIUM PERCHLORATE MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Spherical Ammonium Perchlorate Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Spherical Ammonium Perchlorate Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 SPHERICAL AMMONIUM PERCHLORATE MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Spherical Ammonium Perchlorate Product Life Cycle
- 3.3 Global Spherical Ammonium Perchlorate Sales by Manufacturers (2020-2025)
- 3.4 Global Spherical Ammonium Perchlorate Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Spherical Ammonium Perchlorate Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Spherical Ammonium Perchlorate Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Spherical Ammonium Perchlorate Market Competitive Situation and Trends
 - 3.8.1 Spherical Ammonium Perchlorate Market Concentration Rate

3.8.2 Global 5 and 10 Largest Spherical Ammonium Perchlorate Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 SPHERICAL AMMONIUM PERCHLORATE INDUSTRY CHAIN ANALYSIS

4.1 Spherical Ammonium Perchlorate Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF SPHERICAL AMMONIUM PERCHLORATE MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Spherical Ammonium Perchlorate Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Spherical Ammonium Perchlorate Market

5.7 ESG Ratings of Leading Companies

6 SPHERICAL AMMONIUM PERCHLORATE MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Spherical Ammonium Perchlorate Sales Market Share by Type (2020-2025)

6.3 Global Spherical Ammonium Perchlorate Market Size by Type (2020-2025)

6.4 Global Spherical Ammonium Perchlorate Price by Type (2020-2025)

7 SPHERICAL AMMONIUM PERCHLORATE MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Spherical Ammonium Perchlorate Market Sales by Application (2020-2025)

7.3 Global Spherical Ammonium Perchlorate Market Size (M USD) by Application (2020-2025)

7.4 Global Spherical Ammonium Perchlorate Sales Growth Rate by Application (2020-2025)

8 SPHERICAL AMMONIUM PERCHLORATE MARKET SALES BY REGION

8.1 Global Spherical Ammonium Perchlorate Sales by Region

8.1.1 Global Spherical Ammonium Perchlorate Sales by Region

8.1.2 Global Spherical Ammonium Perchlorate Sales Market Share by Region

8.2 Global Spherical Ammonium Perchlorate Market Size by Region

8.2.1 Global Spherical Ammonium Perchlorate Market Size by Region

8.2.2 Global Spherical Ammonium Perchlorate Market Size by Region

8.3 North America

8.3.1 North America Spherical Ammonium Perchlorate Sales by Country

8.3.2 North America Spherical Ammonium Perchlorate Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Spherical Ammonium Perchlorate Sales by Country

8.4.2 Europe Spherical Ammonium Perchlorate Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Spherical Ammonium Perchlorate Sales by Region

8.5.2 Asia Pacific Spherical Ammonium Perchlorate Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America Spherical Ammonium Perchlorate Sales by Country
 - 8.6.2 South America Spherical Ammonium Perchlorate Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview
 - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Spherical Ammonium Perchlorate Sales by Region
 - 8.7.2 Middle East and Africa Spherical Ammonium Perchlorate Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 SPHERICAL AMMONIUM PERCHLORATE MARKET PRODUCTION BY REGION

- 9.1 Global Production of Spherical Ammonium Perchlorate by Region(2020-2025)
- 9.2 Global Spherical Ammonium Perchlorate Revenue Market Share by Region (2020-2025)
- 9.3 Global Spherical Ammonium Perchlorate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Spherical Ammonium Perchlorate Production
 - 9.4.1 North America Spherical Ammonium Perchlorate Production Growth Rate (2020-2025)
 - 9.4.2 North America Spherical Ammonium Perchlorate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Spherical Ammonium Perchlorate Production
 - 9.5.1 Europe Spherical Ammonium Perchlorate Production Growth Rate (2020-2025)
 - 9.5.2 Europe Spherical Ammonium Perchlorate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Spherical Ammonium Perchlorate Production (2020-2025)
 - 9.6.1 Japan Spherical Ammonium Perchlorate Production Growth Rate (2020-2025)
 - 9.6.2 Japan Spherical Ammonium Perchlorate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Spherical Ammonium Perchlorate Production (2020-2025)

- 9.7.1 China Spherical Ammonium Perchlorate Production Growth Rate (2020-2025)
- 9.7.2 China Spherical Ammonium Perchlorate Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 American Pacific

- 10.1.1 American Pacific Basic Information
- 10.1.2 American Pacific Spherical Ammonium Perchlorate Product Overview
- 10.1.3 American Pacific Spherical Ammonium Perchlorate Product Market Performance
- 10.1.4 American Pacific Business Overview
- 10.1.5 American Pacific SWOT Analysis
- 10.1.6 American Pacific Recent Developments

10.2 Calibre Chemicals

- 10.2.1 Calibre Chemicals Basic Information
- 10.2.2 Calibre Chemicals Spherical Ammonium Perchlorate Product Overview
- 10.2.3 Calibre Chemicals Spherical Ammonium Perchlorate Product Market Performance
- 10.2.4 Calibre Chemicals Business Overview
- 10.2.5 Calibre Chemicals SWOT Analysis
- 10.2.6 Calibre Chemicals Recent Developments

10.3 Tianyuan

- 10.3.1 Tianyuan Basic Information
- 10.3.2 Tianyuan Spherical Ammonium Perchlorate Product Overview
- 10.3.3 Tianyuan Spherical Ammonium Perchlorate Product Market Performance
- 10.3.4 Tianyuan Business Overview
- 10.3.5 Tianyuan SWOT Analysis
- 10.3.6 Tianyuan Recent Developments

10.4 Gaojia Chemical

- 10.4.1 Gaojia Chemical Basic Information
- 10.4.2 Gaojia Chemical Spherical Ammonium Perchlorate Product Overview
- 10.4.3 Gaojia Chemical Spherical Ammonium Perchlorate Product Market Performance
- 10.4.4 Gaojia Chemical Business Overview
- 10.4.5 Gaojia Chemical Recent Developments

10.5 Xiangxiang Zhujindu Electrochemical

- 10.5.1 Xiangxiang Zhujindu Electrochemical Basic Information
- 10.5.2 Xiangxiang Zhujindu Electrochemical Spherical Ammonium Perchlorate Product

Overview

10.5.3 Xiangxiang Zhujindu Electrochemical Spherical Ammonium Perchlorate Product

Market Performance

10.5.4 Xiangxiang Zhujindu Electrochemical Business Overview

10.5.5 Xiangxiang Zhujindu Electrochemical Recent Developments

10.6 Runfeng Chemical

10.6.1 Runfeng Chemical Basic Information

10.6.2 Runfeng Chemical Spherical Ammonium Perchlorate Product Overview

10.6.3 Runfeng Chemical Spherical Ammonium Perchlorate Product Market

Performance

10.6.4 Runfeng Chemical Business Overview

10.6.5 Runfeng Chemical Recent Developments

10.7 Norinco

10.7.1 Norinco Basic Information

10.7.2 Norinco Spherical Ammonium Perchlorate Product Overview

10.7.3 Norinco Spherical Ammonium Perchlorate Product Market Performance

10.7.4 Norinco Business Overview

10.7.5 Norinco Recent Developments

10.8 Eruca Technologies

10.8.1 Eruca Technologies Basic Information

10.8.2 Eruca Technologies Spherical Ammonium Perchlorate Product Overview

10.8.3 Eruca Technologies Spherical Ammonium Perchlorate Product Market

Performance

10.8.4 Eruca Technologies Business Overview

10.8.5 Eruca Technologies Recent Developments

10.9 Pandian Chemicals Limited

10.9.1 Pandian Chemicals Limited Basic Information

10.9.2 Pandian Chemicals Limited Spherical Ammonium Perchlorate Product

Overview

10.9.3 Pandian Chemicals Limited Spherical Ammonium Perchlorate Product Market

Performance

10.9.4 Pandian Chemicals Limited Business Overview

10.9.5 Pandian Chemicals Limited Recent Developments

10.10 Ariane Group

10.10.1 Ariane Group Basic Information

10.10.2 Ariane Group Spherical Ammonium Perchlorate Product Overview

10.10.3 Ariane Group Spherical Ammonium Perchlorate Product Market Performance

10.10.4 Ariane Group Business Overview

10.10.5 Ariane Group Recent Developments

10.11 Mesko

10.11.1 Mesko Basic Information

10.11.2 Mesko Spherical Ammonium Perchlorate Product Overview

10.11.3 Mesko Spherical Ammonium Perchlorate Product Market Performance

10.11.4 Mesko Business Overview

10.11.5 Mesko Recent Developments

11 SPHERICAL AMMONIUM PERCHLORATE MARKET FORECAST BY REGION

11.1 Global Spherical Ammonium Perchlorate Market Size Forecast

11.2 Global Spherical Ammonium Perchlorate Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Spherical Ammonium Perchlorate Market Size Forecast by Country

11.2.3 Asia Pacific Spherical Ammonium Perchlorate Market Size Forecast by Region

11.2.4 South America Spherical Ammonium Perchlorate Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Spherical Ammonium Perchlorate by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Spherical Ammonium Perchlorate Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Spherical Ammonium Perchlorate by Type (2026-2035)

12.1.2 Global Spherical Ammonium Perchlorate Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Spherical Ammonium Perchlorate by Type (2026-2035)

12.2 Global Spherical Ammonium Perchlorate Market Forecast by Application (2026-2035)

12.2.1 Global Spherical Ammonium Perchlorate Sales (K MT) Forecast by Application

12.2.2 Global Spherical Ammonium Perchlorate Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global Spherical Ammonium Perchlorate Market Size by Type (M USD)
- Table 4. Global Spherical Ammonium Perchlorate Market Size by Application
- Table 5. Spherical Ammonium Perchlorate Market Size Comparison by Region (M USD)
- Table 6. Global Spherical Ammonium Perchlorate Sales (K MT) by Manufacturers (2020-2025)
- Table 7. Global Spherical Ammonium Perchlorate Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global Spherical Ammonium Perchlorate Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global Spherical Ammonium Perchlorate Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Spherical Ammonium Perchlorate as of 2025)
- Table 11. Global Market Spherical Ammonium Perchlorate Average Price (USD/KG) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global Spherical Ammonium Perchlorate Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. Spherical Ammonium Perchlorate Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global Spherical Ammonium Perchlorate Sales by Type (K MT)
- Table 27. Global Spherical Ammonium Perchlorate Market Size by Type (M USD)

Table 28. Global Spherical Ammonium Perchlorate Sales (K MT) by Type (2020-2025)

Table 29. Global Spherical Ammonium Perchlorate Sales Market Share by Type (2020-2025)

Table 30. Global Spherical Ammonium Perchlorate Market Size (M USD) by Type (2020-2025)

Table 31. Global Spherical Ammonium Perchlorate Market Share by Type (2020-2025)

Table 32. Global Spherical Ammonium Perchlorate Price (USD/KG) by Type (2020-2025)

Table 33. Global Spherical Ammonium Perchlorate Sales (K MT) by Application

Table 34. Global Spherical Ammonium Perchlorate Market Size by Application

Table 35. Global Spherical Ammonium Perchlorate Sales by Application (2020-2025) & (K MT)

Table 36. Global Spherical Ammonium Perchlorate Sales Market Share by Application (2020-2025)

Table 37. Global Spherical Ammonium Perchlorate Market Size by Application (2020-2025) & (M USD)

Table 38. Global Spherical Ammonium Perchlorate Market Share by Application (2020-2025)

Table 39. Global Spherical Ammonium Perchlorate Sales Growth Rate by Application (2020-2025)

Table 40. Global Spherical Ammonium Perchlorate Sales by Region (2020-2025) & (K MT)

Table 41. Global Spherical Ammonium Perchlorate Sales Market Share by Region (2020-2025)

Table 42. Global Spherical Ammonium Perchlorate Market Size by Region (2020-2025) & (M USD)

Table 43. Global Spherical Ammonium Perchlorate Market Size by Region (2020-2025)

Table 44. North America Spherical Ammonium Perchlorate Sales by Country (2020-2025) & (K MT)

Table 45. North America Spherical Ammonium Perchlorate Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Spherical Ammonium Perchlorate Sales by Country (2020-2025) & (K MT)

Table 47. Europe Spherical Ammonium Perchlorate Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Spherical Ammonium Perchlorate Sales by Region (2020-2025) & (K MT)

Table 49. Asia Pacific Spherical Ammonium Perchlorate Market Size by Region (2020-2025) & (M USD)

- Table 50. South America Spherical Ammonium Perchlorate Sales by Country (2020-2025) & (K MT)
- Table 51. South America Spherical Ammonium Perchlorate Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Spherical Ammonium Perchlorate Sales by Region (2020-2025) & (K MT)
- Table 53. Middle East and Africa Spherical Ammonium Perchlorate Market Size by Region (2020-2025) & (M USD)
- Table 54. Global Spherical Ammonium Perchlorate Production (K MT) by Region(2020-2025)
- Table 55. Global Spherical Ammonium Perchlorate Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global Spherical Ammonium Perchlorate Revenue Market Share by Region (2020-2025)
- Table 57. Global Spherical Ammonium Perchlorate Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 58. North America Spherical Ammonium Perchlorate Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 59. Europe Spherical Ammonium Perchlorate Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 60. Japan Spherical Ammonium Perchlorate Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 61. China Spherical Ammonium Perchlorate Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 62. American Pacific Basic Information
- Table 63. American Pacific Spherical Ammonium Perchlorate Product Overview
- Table 64. American Pacific Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 65. American Pacific Business Overview
- Table 66. American Pacific SWOT Analysis
- Table 67. American Pacific Recent Developments
- Table 68. Calibre Chemicals Basic Information
- Table 69. Calibre Chemicals Spherical Ammonium Perchlorate Product Overview
- Table 70. Calibre Chemicals Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 71. Calibre Chemicals Business Overview
- Table 72. Calibre Chemicals SWOT Analysis
- Table 73. Calibre Chemicals Recent Developments
- Table 74. Tianyuan Basic Information

- Table 75. Tianyuan Spherical Ammonium Perchlorate Product Overview
- Table 76. Tianyuan Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 77. Tianyuan Business Overview
- Table 78. Tianyuan SWOT Analysis
- Table 79. Tianyuan Recent Developments
- Table 80. Gaojia Chemical Basic Information
- Table 81. Gaojia Chemical Spherical Ammonium Perchlorate Product Overview
- Table 82. Gaojia Chemical Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 83. Gaojia Chemical Business Overview
- Table 84. Gaojia Chemical Recent Developments
- Table 85. Xiangxiang Zhujindu Electrochemical Basic Information
- Table 86. Xiangxiang Zhujindu Electrochemical Spherical Ammonium Perchlorate Product Overview
- Table 87. Xiangxiang Zhujindu Electrochemical Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 88. Xiangxiang Zhujindu Electrochemical Business Overview
- Table 89. Xiangxiang Zhujindu Electrochemical Recent Developments
- Table 90. Runfeng Chemical Basic Information
- Table 91. Runfeng Chemical Spherical Ammonium Perchlorate Product Overview
- Table 92. Runfeng Chemical Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 93. Runfeng Chemical Business Overview
- Table 94. Runfeng Chemical Recent Developments
- Table 95. Norinco Basic Information
- Table 96. Norinco Spherical Ammonium Perchlorate Product Overview
- Table 97. Norinco Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 98. Norinco Business Overview
- Table 99. Norinco Recent Developments
- Table 100. Eruca Technologies Basic Information
- Table 101. Eruca Technologies Spherical Ammonium Perchlorate Product Overview
- Table 102. Eruca Technologies Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 103. Eruca Technologies Business Overview
- Table 104. Eruca Technologies Recent Developments
- Table 105. Pandian Chemicals Limited Basic Information
- Table 106. Pandian Chemicals Limited Spherical Ammonium Perchlorate Product

Overview

Table 107. Pandian Chemicals Limited Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 108. Pandian Chemicals Limited Business Overview

Table 109. Pandian Chemicals Limited Recent Developments

Table 110. Ariane Group Basic Information

Table 111. Ariane Group Spherical Ammonium Perchlorate Product Overview

Table 112. Ariane Group Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 113. Ariane Group Business Overview

Table 114. Ariane Group Recent Developments

Table 115. Mesko Basic Information

Table 116. Mesko Spherical Ammonium Perchlorate Product Overview

Table 117. Mesko Spherical Ammonium Perchlorate Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 118. Mesko Business Overview

Table 119. Mesko Recent Developments

Table 120. Global Spherical Ammonium Perchlorate Sales Forecast by Region (2026-2035) & (K MT)

Table 121. Global Spherical Ammonium Perchlorate Market Size Forecast by Region (2026-2035) & (M USD)

Table 122. North America Spherical Ammonium Perchlorate Sales Forecast by Country (2026-2035) & (K MT)

Table 123. North America Spherical Ammonium Perchlorate Market Size Forecast by Country (2026-2035) & (M USD)

Table 124. Europe Spherical Ammonium Perchlorate Sales Forecast by Country (2026-2035) & (K MT)

Table 125. Europe Spherical Ammonium Perchlorate Market Size Forecast by Country (2026-2035) & (M USD)

Table 126. Asia Pacific Spherical Ammonium Perchlorate Sales Forecast by Region (2026-2035) & (K MT)

Table 127. Asia Pacific Spherical Ammonium Perchlorate Market Size Forecast by Region (2026-2035) & (M USD)

Table 128. South America Spherical Ammonium Perchlorate Sales Forecast by Country (2026-2035) & (K MT)

Table 129. South America Spherical Ammonium Perchlorate Market Size Forecast by Country (2026-2035) & (M USD)

Table 130. Middle East and Africa Spherical Ammonium Perchlorate Sales Forecast by Country (2026-2035) & (Units)

Table 131. Middle East and Africa Spherical Ammonium Perchlorate Market Size Forecast by Country (2026-2035) & (M USD)

Table 132. Global Spherical Ammonium Perchlorate Sales Forecast by Type (2026-2035) & (K MT)

Table 133. Global Spherical Ammonium Perchlorate Market Size Forecast by Type (2026-2035) & (M USD)

Table 134. Global Spherical Ammonium Perchlorate Price Forecast by Type (2026-2035) & (USD/KG)

Table 135. Global Spherical Ammonium Perchlorate Sales (K MT) Forecast by Application (2026-2035)

Table 136. Global Spherical Ammonium Perchlorate Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Spherical Ammonium Perchlorate
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Spherical Ammonium Perchlorate Market Size (M USD), 2025-2035
- Figure 5. Global Spherical Ammonium Perchlorate Market Size (M USD) (2020-2035)
- Figure 6. Global Spherical Ammonium Perchlorate Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Spherical Ammonium Perchlorate Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Spherical Ammonium Perchlorate Product Life Cycle
- Figure 13. Spherical Ammonium Perchlorate Sales Share by Manufacturers in 2025
- Figure 14. Global Spherical Ammonium Perchlorate Revenue Share by Manufacturers in 2025
- Figure 15. Spherical Ammonium Perchlorate Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Spherical Ammonium Perchlorate Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Spherical Ammonium Perchlorate Revenue in 2025
- Figure 18. Industry Chain Map of Spherical Ammonium Perchlorate
- Figure 19. Global Spherical Ammonium Perchlorate Market PEST Analysis
- Figure 20. Global Spherical Ammonium Perchlorate Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Spherical Ammonium Perchlorate Market Share by Type
- Figure 27. Sales Market Share of Spherical Ammonium Perchlorate by Type (2020-2025)
- Figure 28. Sales Market Share of Spherical Ammonium Perchlorate by Type in 2025
- Figure 29. Market Share of Spherical Ammonium Perchlorate by Type (2020-2025)

- Figure 30. Market Share of Spherical Ammonium Perchlorate by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Spherical Ammonium Perchlorate Market Share by Application
- Figure 33. Global Spherical Ammonium Perchlorate Sales Market Share by Application (2020-2025)
- Figure 34. Global Spherical Ammonium Perchlorate Sales Market Share by Application in 2025
- Figure 35. Global Spherical Ammonium Perchlorate Market Share by Application (2020-2025)
- Figure 36. Global Spherical Ammonium Perchlorate Market Share by Application in 2025
- Figure 37. Global Spherical Ammonium Perchlorate Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Spherical Ammonium Perchlorate Sales Market Share by Region (2020-2025)
- Figure 39. Global Spherical Ammonium Perchlorate Market Size by Region (2020-2025)
- Figure 40. North America Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)
- Figure 41. North America Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)
- Figure 42. North America Spherical Ammonium Perchlorate Sales Market Share by Country in 2024
- Figure 43. North America Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Spherical Ammonium Perchlorate Market Size by Country in 2024
- Figure 45. U.S. Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)
- Figure 46. U.S. Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Spherical Ammonium Perchlorate Sales (K MT) and Growth Rate (2020-2025)
- Figure 48. Canada Spherical Ammonium Perchlorate Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Spherical Ammonium Perchlorate Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Spherical Ammonium Perchlorate Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Spherical Ammonium Perchlorate Sales and Growth Rate

(2020-2025) & (K MT)

Figure 52. Europe Spherical Ammonium Perchlorate Sales Market Share by Country in 2024

Figure 53. Europe Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Spherical Ammonium Perchlorate Market Size by Country in 2024

Figure 55. Germany Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 58. France Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Spherical Ammonium Perchlorate Sales and Growth Rate (K MT)

Figure 66. Asia Pacific Spherical Ammonium Perchlorate Sales Market Share by Region in 2024

Figure 67. Asia Pacific Spherical Ammonium Perchlorate Market Size by Region in 2024

Figure 68. China Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan Spherical Ammonium Perchlorate Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 72. South Korea Spherical Ammonium Perchlorate Sales and Growth Rate

(2020-2025) & (K MT)

Figure 73. South Korea Spherical Ammonium Perchlorate Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 74. India Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025)
& (K MT)

Figure 75. India Spherical Ammonium Perchlorate Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 76. Southeast Asia Spherical Ammonium Perchlorate Sales and Growth Rate

(2020-2025) & (K MT)

Figure 77. Southeast Asia Spherical Ammonium Perchlorate Market Size and Growth

Rate (2020-2025) & (M USD)

Figure 78. South America Spherical Ammonium Perchlorate Sales and Growth Rate (K
MT)

Figure 79. South America Spherical Ammonium Perchlorate Sales Market Share by
Country in 2024

Figure 80. South America Spherical Ammonium Perchlorate Market Size and Growth
Rate (M USD)

Figure 81. South America Spherical Ammonium Perchlorate Market Size by Country in
2024

Figure 82. Brazil Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025)
& (K MT)

Figure 83. Brazil Spherical Ammonium Perchlorate Market Size and Growth Rate
(2020-2025) & (M USD)

Figure 84. Argentina Spherical Ammonium Perchlorate Sales and Growth Rate
(2020-2025) & (K MT)

Figure 85. Argentina Spherical Ammonium Perchlorate Market Size and Growth Rate
(2020-2025) & (M USD)

Figure 86. Columbia Spherical Ammonium Perchlorate Sales and Growth Rate
(2020-2025) & (K MT)

Figure 87. Columbia Spherical Ammonium Perchlorate Market Size and Growth Rate
(2020-2025) & (M USD)

Figure 88. Middle East and Africa Spherical Ammonium Perchlorate Sales and Growth
Rate (K MT)

Figure 89. Middle East and Africa Spherical Ammonium Perchlorate Sales Market
Share by Region in 2024

Figure 90. Middle East and Africa Spherical Ammonium Perchlorate Market Size and
Growth Rate (M USD)

Figure 91. Middle East and Africa Spherical Ammonium Perchlorate Market Size by Region in 2024

Figure 92. Saudi Arabia Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Spherical Ammonium Perchlorate Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa Spherical Ammonium Perchlorate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Spherical Ammonium Perchlorate Production Market Share by Region (2020-2025)

Figure 103. North America Spherical Ammonium Perchlorate Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Spherical Ammonium Perchlorate Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Spherical Ammonium Perchlorate Production (K MT) Growth Rate (2020-2025)

Figure 106. China Spherical Ammonium Perchlorate Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Spherical Ammonium Perchlorate Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global Spherical Ammonium Perchlorate Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Spherical Ammonium Perchlorate Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Spherical Ammonium Perchlorate Market Share Forecast by Type

(2026-2035)

Figure 111. Global Spherical Ammonium Perchlorate Sales Forecast by Application

(2026-2035)

Figure 112. Global Spherical Ammonium Perchlorate Market Share Forecast by Application (2026-2035)

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