

Global Battery-Grade Zirconium Oxychloride Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G8375E018AD4EN.html>

Date: August 2026

Pages: 94

Price: US\$ 3,480.00 (Single User License)

ID: G8375E018AD4EN

Abstracts

According to our (Global Info Research) latest study, the global Battery-Grade Zirconium Oxychloride market size was valued at US\$ 24.03 million in 2025 and is forecast to a readjusted size of US\$ 33.82 million by 2032 with a CAGR of 5.1% during review period.

In 2025, global production of battery-grade zirconium oxychloride reached 7,000 metric tons, with an average price of \$3,125 per ton.

Battery-grade zirconium oxychloride is a high-purity zirconium compound derived from standard zirconium oxychloride through processes such as high-level purification, impurity removal, and control of particle size, solubility, and reactivity. It is primarily used to produce battery-grade zirconium oxide, zirconium-based additives, cathode material dopants and coating agents, ceramic coating materials for separators, and zirconium sources for oxide electrolytes in solid-state batteries.

The raw material system for battery-grade zirconium oxychloride centers on zircon sand (ZrSiO_3), supplemented by chemical reagents such as caustic soda (NaOH), hydrochloric acid (HCl), sulfuric acid, and aqueous ammonia. Zircon sand is the sole direct mineral source for producing zirconium oxychloride. Global zirconium resources are highly concentrated in Australia and South Africa; China relies heavily on imports, while Orient Zirconium and Australia's Rio Tinto jointly control over 70% of global zirconium ore resources. In 2025, global zircon sand production was approximately 1.2 million tons (in terms of ZrO_2 content), with about 70% converted into various zirconium chemical products. Major Australian zircon mining areas are expected to be depleted between 2026 and 2027, driving an upward trend in raw material prices. Additionally,

caustic soda is used for the alkali fusion decomposition of zircon sand, hydrochloric acid for the acid leaching of zirconium hydroxide, and aqueous ammonia for precipitation and impurity removal. While these are widely available industrial commodities, price fluctuations impact production costs. Some enterprises are also exploring the recovery of associated elements such as zirconium, scandium, and rare earths from zirconium oxychloride crystallization mother liquor to enhance resource utilization efficiency.

Regarding cost structure, raw materials represent the largest component of production costs for battery-grade zirconium oxychloride, typically accounting for 50%–60% of the total; as the core raw material, fluctuations in the price of zircon sand have the most significant impact on total costs. Energy costs account for approximately 15%–25% of the total. The alkali fusion process consumes significant amounts of steam and involves high energy consumption during evaporation and concentration; it also generates 7–8.5 tons of zirconium-bearing waste acid per ton of zirconium oxychloride produced. While the fluidized-bed chlorination process consumes less energy overall, the high-temperature chlorination reaction itself demands substantial electricity and fuel. Equipment depreciation and maintenance costs account for about 10%–15%; fluidized-bed chlorination requires specialized equipment such as high-temperature chlorination furnaces and condensation systems, entailing high investment, whereas alkali fusion requires acid- and alkali-resistant reactors and evaporation/concentration equipment. Environmental treatment costs account for 5%–10%; production generates large volumes of acidic wastewater and low-level radioactive waste residue (as zircon sand contains naturally occurring radioactive elements), resulting in high compliance costs, with mother liquor utilization and waste residue disposal representing major expense items. Labor and management costs account for 5%–10%. Overall, the production cost of battery-grade zirconium oxychloride is influenced by three factors: the supply landscape of zirconium resources, energy prices, and environmental policies. As demand for solid-state batteries surges and zirconium resources tighten, cost pressures may rise further; however, extending the value chain into high-value-added downstream materials (such as solid-state electrolyte powders) can significantly enhance profitability.

This report is a detailed and comprehensive analysis for global Battery-Grade Zirconium Oxychloride market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Battery-Grade Zirconium Oxychloride market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Battery-Grade Zirconium Oxychloride market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Battery-Grade Zirconium Oxychloride market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Battery-Grade Zirconium Oxychloride market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Battery-Grade Zirconium Oxychloride

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Battery-Grade Zirconium Oxychloride market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Orient Zirconic Ind Sci & Tech, Changyu Holding Group, Jiangxi Jingan High Technology, Sanxiang Advanced Materials, Saint-Gobain ZirPro, DKK Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Battery-Grade Zirconium Oxychloride market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Standard Battery-grade

High-purity Battery-grade

Ultra-high Purity / Zirconium-hafnium Separation Grade

Market segment by Processes

Single-acid/Single-alkali Method

Fluidized-bed Chlorination Method

Other

Market segment by Downstream Derivative Products

Battery-grade Zirconium Oxide Precursor

Nano-zirconium Oxide Precursor

Zirconium-based Solid-state Electrolyte Precursor

Raw Material for Zirconium-based Coating Solution

Market segment by Application

Cathode Materials

Ceramic Coating for Separators

Solid-state Battery Electrolytes

Other

Major players covered

Orient Zirconic Ind Sci & Tech

Changyu Holding Group

Jiangxi Jingan High Technology

Sanxiang Advanced Materials

Saint-Gobain ZirPro

DKK Group

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Battery-Grade Zirconium Oxychloride product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Battery-Grade Zirconium Oxychloride, with price, sales quantity, revenue, and global market share of Battery-Grade Zirconium Oxychloride from 2021 to 2026.

Chapter 3, the Battery-Grade Zirconium Oxychloride competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Battery-Grade Zirconium Oxychloride breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Battery-Grade Zirconium Oxychloride market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Battery-Grade Zirconium Oxychloride.

Chapter 14 and 15, to describe Battery-Grade Zirconium Oxychloride sales channel, distributors, customers, research findings and conclusion.

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