

Global Battery-Grade Zirconium Oxychloride Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G8FBB39D1FC4EN.html>

Date: August 2026

Pages: 107

Price: US\$ 4,480.00 (Single User License)

ID: G8FBB39D1FC4EN

Abstracts

The global Battery-Grade Zirconium Oxychloride market size is expected to reach \$ 33.82 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

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_4), 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 studies the global Battery-Grade Zirconium Oxychloride production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Battery-Grade Zirconium Oxychloride and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Battery-Grade Zirconium Oxychloride that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Battery-Grade Zirconium Oxychloride total production and demand, 2021-2032, (Tons)

Global Battery-Grade Zirconium Oxychloride total production value, 2021-2032, (USD Million)

Global Battery-Grade Zirconium Oxychloride production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Battery-Grade Zirconium Oxychloride consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Battery-Grade Zirconium Oxychloride domestic production, consumption, key domestic manufacturers and share

Global Battery-Grade Zirconium Oxychloride production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Battery-Grade Zirconium Oxychloride production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Battery-Grade Zirconium Oxychloride production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Battery-Grade Zirconium Oxychloride market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Battery-Grade Zirconium Oxychloride market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Battery-Grade Zirconium Oxychloride Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Battery-Grade Zirconium Oxychloride Market, Segmentation by Type:

Standard Battery-grade

High-purity Battery-grade

Ultra-high Purity / Zirconium-hafnium Separation Grade

Global Battery-Grade Zirconium Oxychloride Market, Segmentation by Processes:

Single-acid/Single-alkali Method

Fluidized-bed Chlorination Method

Other

Global Battery-Grade Zirconium Oxychloride Market, Segmentation 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

Global Battery-Grade Zirconium Oxychloride Market, Segmentation by Application:

Cathode Materials

Ceramic Coating for Separators

Solid-state Battery Electrolytes

Other

Companies Profiled:

Orient Zirconic Ind Sci & Tech

Changyu Holding Group

Jiangxi Jingan High Technology

Sanxiang Advanced Materials

Saint-Gobain ZirPro

DKK Group

Key Questions Answered:

1. How big is the global Battery-Grade Zirconium Oxychloride market?

2. What is the demand of the global Battery-Grade Zirconium Oxychloride market?
3. What is the year over year growth of the global Battery-Grade Zirconium Oxychloride market?
4. What is the production and production value of the global Battery-Grade Zirconium Oxychloride market?
5. Who are the key producers in the global Battery-Grade Zirconium Oxychloride market?
6. What are the growth factors driving the market demand?

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