

Global Elemental Selenium Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GC0F4079D5E0EN.html>

Date: September 2026

Pages: 154

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

ID: GC0F4079D5E0EN

Abstracts

The global Elemental Selenium market size is expected to reach \$ 157 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Elemental selenium refers to commercially available selenium products in which selenium is present predominantly in its zero-valence elemental form. After recovery, refining, and shaping, the products are supplied as selenium powder, granules, pellets, shots, ingots, lumps, or other elemental forms. Elemental selenium is primarily recovered as a by-product of electrolytic copper refining from selenium-bearing anode slimes and is supplied in different purity grades according to its impurity content. Its major applications include metallurgy, glass manufacturing, agriculture and healthcare, electronics and photovoltaics, chemicals, and pigments. This report excludes crude selenium, selenium-bearing anode slimes and other metallurgical intermediates, as well as selenium dioxide, selenites, selenates, metal selenides, organic selenium, and other downstream selenium-containing products. Global elemental selenium production was approximately 4,380.28 metric tons in 2025, with an average ex-factory price of approximately US\$25.00 per kilogram.

Elemental selenium refers to commercially available selenium products in which selenium is predominantly present in its zero-valence elemental form after recovery, refining, and shaping. Major product forms include selenium powder, granules, pellets, ingots, and lumps. By purity, elemental selenium can be classified into three categories: Se <99.9%, 99.9%?Se<99.99%, and Se?99.99%. This report excludes crude selenium, selenium-bearing anode slimes, and other metallurgical intermediates, as well as selenium dioxide, selenites, selenates, metal selenides, organic selenium, and other downstream selenium-containing products. Elemental selenium has a strong by-product resource characteristic. It is primarily recovered from copper anode slimes generated

during electrolytic copper refining, while a smaller proportion is obtained from lead, nickel, and other non-ferrous metal smelting processes. Industry supply is therefore closely related to electrolytic copper production, selenium content in copper concentrates, anode-slimes processing capacity, recovery technologies, and the production schedules of smelting companies. As a result, selenium supply cannot be expanded solely in response to selenium demand and prices. Even when downstream demand grows rapidly, supply may remain constrained by upstream copper-smelting capacity and by-product recovery conditions. The upstream segment of the industry chain mainly comprises copper anode slimes, crude selenium, and other selenium-bearing metallurgical by-products. The midstream segment covers leaching, oxidation, reduction, distillation, vacuum purification, zone refining, and shaping processes such as crushing, granulation, and ingot casting. Major downstream applications include metallurgy, glass manufacturing, agriculture and healthcare, electronics and photovoltaics, chemicals, and pigments. In metallurgy, selenium is primarily used to improve the processing performance of steel, copper alloys, and other metallic materials. In glass manufacturing, it is used for decolorization and coloration. In agriculture and healthcare, elemental selenium is further processed into selenium-containing raw materials for animal feed, nutritional products, and pharmaceutical applications. Electronics and photovoltaic applications impose more stringent requirements on product purity, impurity control, and particle consistency. Industry competition is concentrated among large non-ferrous metal companies with copper-smelting resources and anode-slimes recovery capabilities, as well as specialized materials companies with advanced high-purity refining and precision-shaping capabilities. Major suppliers include Vital Materials, Yunnan Copper Science & Technology Development, LS MnM, Mitsubishi Materials, Pan Pacific Copper, Sumitomo Metal Mining, Umicore, Nornickel, and RETORTE. Elemental selenium production capacity within large copper-smelting systems generally ranges from several tens to several hundreds of metric tons per year, while some leading suppliers have annual capacities of approximately 200–700 metric tons. High-purity selenium production lines are generally smaller in scale but have higher value added and greater customer-qualification barriers. Elemental selenium products are highly differentiated by specification. For industrial-grade and 3N-grade selenium, the principal competitive factors include feedstock stability, recovery efficiency, production scale, and delivery cost. High-purity selenium places greater emphasis on controlling impurities such as copper, lead, arsenic, tellurium, and iron, as well as particle size, morphological consistency, batch-to-batch stability, and qualification by electronic-material customers. Conventional selenium powder and ingots are relatively standardized, whereas high-purity selenium granules, evaporation materials, and customized forms usually require lengthy customer validation, making supplier replacement more difficult. Gross margins

vary significantly depending on feedstock sourcing, cost-allocation methods, product purity, and processing depth. Companies with integrated copper-smelting operations generally account for selenium as a by-product, allowing the cost of anode-slime feedstock to be allocated across gold, silver, tellurium, and other associated products. Gross margins for industrial-grade elemental selenium are generally estimated at approximately 10%–20%. Specialized processors that purchase crude selenium for further refining and shaping are more exposed to fluctuations in feedstock prices and processing fees. High-purity selenium, electronic-grade selenium, and customized granule products typically achieve gross margins of approximately 20%–40%, while certain ultra-high-purity and small-batch specialty products may generate higher margins. Key approaches to improving profitability include increasing selenium recovery from anode slimes, expanding high-purity product portfolios, optimizing by-product cost allocation, and increasing exposure to higher-value applications such as electronics, photovoltaics, and healthcare.

Report Scope

This report studies the global Elemental Selenium production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Elemental Selenium 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 Elemental Selenium that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Elemental Selenium total production and demand, 2021-2032, (Tons)

Global Elemental Selenium total production value, 2021-2032, (USD Million)

Global Elemental Selenium production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Elemental Selenium consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Elemental Selenium domestic production, consumption, key domestic manufacturers and share

Global Elemental Selenium production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Elemental Selenium production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Elemental Selenium production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Elemental Selenium 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 First Rare Materials, Yunnan Copper Science & Technology Development, Jinchuan Group, LS MnM, Mitsubishi Materials Corporation, RETORTE, PPC, Umicore, Sumitomo Metal Mining, Ural Mining and Metallurgical Company, 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 Elemental Selenium market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Kg) 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 Elemental Selenium Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Elemental Selenium Market, Segmentation by Type:

Selenium Powder

Selenium Granules and Pellets

Selenium Ingots and Lumps

Other Selenium Forms

Global Elemental Selenium Market, Segmentation by Purity:

Se<99.9%

99.9%?Se<99.99%

Se?99.99%

Global Elemental Selenium Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Elemental Selenium Market, Segmentation by Application:

Metallurgy

Agriculture and Healthcare

Glass Manufacturing

Electronics and Photovoltaics

Chemicals and Pigments

Others

Companies Profiled:

First Rare Materials

Yunnan Copper Science & Technology Development

Jinchuan Group

LS MnM

Mitsubishi Materials Corporation

RETORTE

PPC

Umicore

Sumitomo Metal Mining

Ural Mining and Metallurgical Company

Southern Copper Corporation

Hefei Mengen Biotechnology

Kazakhmys Progress

Shinko Chemical

Coherent

Nornickel

KGHM Polska Mied?

Nippon Rare Metal

Boliden AB

Hindalco Industries

Key Questions Answered

1. How big is the global Elemental Selenium market?
2. What is the demand of the global Elemental Selenium market?
3. What is the year over year growth of the global Elemental Selenium market?
4. What is the total value of the global Elemental Selenium market?
5. Who are the Major Players in the global Elemental Selenium market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Elemental Selenium Introduction
- 1.2 World Elemental Selenium Supply & Forecast
 - 1.2.1 World Elemental Selenium Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Elemental Selenium Production (2021-2032)
 - 1.2.3 World Elemental Selenium Pricing Trends (2021-2032)
- 1.3 World Elemental Selenium Production by Region (Based on Production Site)
 - 1.3.1 World Elemental Selenium Production Value by Region (2021-2032)
 - 1.3.2 World Elemental Selenium Production by Region (2021-2032)
 - 1.3.3 World Elemental Selenium Average Price by Region (2021-2032)
 - 1.3.4 North America Elemental Selenium Production (2021-2032)
 - 1.3.5 Europe Elemental Selenium Production (2021-2032)
 - 1.3.6 China Elemental Selenium Production (2021-2032)
 - 1.3.7 Japan Elemental Selenium Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Elemental Selenium Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Elemental Selenium Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Elemental Selenium Demand (2021-2032)
- 2.2 World Elemental Selenium Consumption by Region
 - 2.2.1 World Elemental Selenium Consumption by Region (2021-2026)
 - 2.2.2 World Elemental Selenium Consumption Forecast by Region (2027-2032)
- 2.3 United States Elemental Selenium Consumption (2021-2032)
- 2.4 China Elemental Selenium Consumption (2021-2032)
- 2.5 Europe Elemental Selenium Consumption (2021-2032)
- 2.6 Japan Elemental Selenium Consumption (2021-2032)
- 2.7 South Korea Elemental Selenium Consumption (2021-2032)
- 2.8 ASEAN Elemental Selenium Consumption (2021-2032)
- 2.9 India Elemental Selenium Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Elemental Selenium Production Value by Manufacturer (2021-2026)

- 3.2 World Elemental Selenium Production by Manufacturer (2021-2026)
- 3.3 World Elemental Selenium Average Price by Manufacturer (2021-2026)
- 3.4 Elemental Selenium Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Elemental Selenium Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Elemental Selenium in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Elemental Selenium in 2025
- 3.6 Elemental Selenium Market: Overall Company Footprint Analysis
 - 3.6.1 Elemental Selenium Market: Region Footprint
 - 3.6.2 Elemental Selenium Market: Company Product Type Footprint
 - 3.6.3 Elemental Selenium Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Elemental Selenium Production Value Comparison
 - 4.1.1 United States VS China: Elemental Selenium Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Elemental Selenium Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Elemental Selenium Production Comparison
 - 4.2.1 United States VS China: Elemental Selenium Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Elemental Selenium Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Elemental Selenium Consumption Comparison
 - 4.3.1 United States VS China: Elemental Selenium Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Elemental Selenium Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Elemental Selenium Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Elemental Selenium Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Elemental Selenium Production Value (2021-2026)

4.4.3 United States Based Manufacturers Elemental Selenium Production (2021-2026)

4.5 China Based Elemental Selenium Manufacturers and Market Share

4.5.1 China Based Elemental Selenium Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Elemental Selenium Production Value (2021-2026)

4.5.3 China Based Manufacturers Elemental Selenium Production (2021-2026)

4.6 Rest of World Based Elemental Selenium Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Elemental Selenium Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Elemental Selenium Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Elemental Selenium Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Elemental Selenium Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Selenium Powder

5.2.2 Selenium Granules and Pellets

5.2.3 Selenium Ingots and Lumps

5.2.4 Other Selenium Forms

5.3 Market Segment by Type

5.3.1 World Elemental Selenium Production by Type (2021-2032)

5.3.2 World Elemental Selenium Production Value by Type (2021-2032)

5.3.3 World Elemental Selenium Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PURITY

6.1 World Elemental Selenium Market Size Overview by Purity: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Purity

6.2.1 Se<99.9%

6.2.2 99.9%?Se<99.99%

6.2.3 Se?99.99%

6.3 Market Segment by Purity

6.3.1 World Elemental Selenium Production by Purity (2021-2032)

6.3.2 World Elemental Selenium Production Value by Purity (2021-2032)

6.3.3 World Elemental Selenium Average Price by Purity (2021-2032)

7 MARKET ANALYSIS BY SALES CHANNEL

7.1 World Elemental Selenium Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Sales Channel

7.2.1 Direct Sales

7.2.2 Distribution

7.3 Market Segment by Sales Channel

7.3.1 World Elemental Selenium Production by Sales Channel (2021-2032)

7.3.2 World Elemental Selenium Production Value by Sales Channel (2021-2032)

7.3.3 World Elemental Selenium Average Price by Sales Channel (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Elemental Selenium Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Metallurgy

8.2.2 Agriculture and Healthcare

8.2.3 Glass Manufacturing

8.2.4 Electronics and Photovoltaics

8.2.5 Chemicals and Pigments

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World Elemental Selenium Production by Application (2021-2032)

8.3.2 World Elemental Selenium Production Value by Application (2021-2032)

8.3.3 World Elemental Selenium Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 First Rare Materials

9.1.1 First Rare Materials Details

9.1.2 First Rare Materials Major Business

9.1.3 First Rare Materials Elemental Selenium Product and Services

9.1.4 First Rare Materials Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 First Rare Materials Recent Developments/Updates

- 9.1.6 First Rare Materials Competitive Strengths & Weaknesses
- 9.2 Yunnan Copper Science & Technology Development
 - 9.2.1 Yunnan Copper Science & Technology Development Details
 - 9.2.2 Yunnan Copper Science & Technology Development Major Business
 - 9.2.3 Yunnan Copper Science & Technology Development Elemental Selenium Product and Services
 - 9.2.4 Yunnan Copper Science & Technology Development Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Yunnan Copper Science & Technology Development Recent Developments/Updates
 - 9.2.6 Yunnan Copper Science & Technology Development Competitive Strengths & Weaknesses
- 9.3 Jinchuan Group
 - 9.3.1 Jinchuan Group Details
 - 9.3.2 Jinchuan Group Major Business
 - 9.3.3 Jinchuan Group Elemental Selenium Product and Services
 - 9.3.4 Jinchuan Group Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Jinchuan Group Recent Developments/Updates
 - 9.3.6 Jinchuan Group Competitive Strengths & Weaknesses
- 9.4 LS MnM
 - 9.4.1 LS MnM Details
 - 9.4.2 LS MnM Major Business
 - 9.4.3 LS MnM Elemental Selenium Product and Services
 - 9.4.4 LS MnM Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 LS MnM Recent Developments/Updates
 - 9.4.6 LS MnM Competitive Strengths & Weaknesses
- 9.5 Mitsubishi Materials Corporation
 - 9.5.1 Mitsubishi Materials Corporation Details
 - 9.5.2 Mitsubishi Materials Corporation Major Business
 - 9.5.3 Mitsubishi Materials Corporation Elemental Selenium Product and Services
 - 9.5.4 Mitsubishi Materials Corporation Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Mitsubishi Materials Corporation Recent Developments/Updates
 - 9.5.6 Mitsubishi Materials Corporation Competitive Strengths & Weaknesses
- 9.6 RETORTE
 - 9.6.1 RETORTE Details
 - 9.6.2 RETORTE Major Business

- 9.6.3 RETORTE Elemental Selenium Product and Services
- 9.6.4 RETORTE Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 RETORTE Recent Developments/Updates
- 9.6.6 RETORTE Competitive Strengths & Weaknesses
- 9.7 PPC
 - 9.7.1 PPC Details
 - 9.7.2 PPC Major Business
 - 9.7.3 PPC Elemental Selenium Product and Services
 - 9.7.4 PPC Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 PPC Recent Developments/Updates
 - 9.7.6 PPC Competitive Strengths & Weaknesses
- 9.8 Umicore
 - 9.8.1 Umicore Details
 - 9.8.2 Umicore Major Business
 - 9.8.3 Umicore Elemental Selenium Product and Services
 - 9.8.4 Umicore Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Umicore Recent Developments/Updates
 - 9.8.6 Umicore Competitive Strengths & Weaknesses
- 9.9 Sumitomo Metal Mining
 - 9.9.1 Sumitomo Metal Mining Details
 - 9.9.2 Sumitomo Metal Mining Major Business
 - 9.9.3 Sumitomo Metal Mining Elemental Selenium Product and Services
 - 9.9.4 Sumitomo Metal Mining Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Sumitomo Metal Mining Recent Developments/Updates
 - 9.9.6 Sumitomo Metal Mining Competitive Strengths & Weaknesses
- 9.10 Ural Mining and Metallurgical Company
 - 9.10.1 Ural Mining and Metallurgical Company Details
 - 9.10.2 Ural Mining and Metallurgical Company Major Business
 - 9.10.3 Ural Mining and Metallurgical Company Elemental Selenium Product and Services
 - 9.10.4 Ural Mining and Metallurgical Company Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Ural Mining and Metallurgical Company Recent Developments/Updates
 - 9.10.6 Ural Mining and Metallurgical Company Competitive Strengths & Weaknesses
- 9.11 Southern Copper Corporation

- 9.11.1 Southern Copper Corporation Details
- 9.11.2 Southern Copper Corporation Major Business
- 9.11.3 Southern Copper Corporation Elemental Selenium Product and Services
- 9.11.4 Southern Copper Corporation Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Southern Copper Corporation Recent Developments/Updates
- 9.11.6 Southern Copper Corporation Competitive Strengths & Weaknesses
- 9.12 Hefei Mengen Biotechnology
 - 9.12.1 Hefei Mengen Biotechnology Details
 - 9.12.2 Hefei Mengen Biotechnology Major Business
 - 9.12.3 Hefei Mengen Biotechnology Elemental Selenium Product and Services
 - 9.12.4 Hefei Mengen Biotechnology Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Hefei Mengen Biotechnology Recent Developments/Updates
 - 9.12.6 Hefei Mengen Biotechnology Competitive Strengths & Weaknesses
- 9.13 Kazakhmys Progress
 - 9.13.1 Kazakhmys Progress Details
 - 9.13.2 Kazakhmys Progress Major Business
 - 9.13.3 Kazakhmys Progress Elemental Selenium Product and Services
 - 9.13.4 Kazakhmys Progress Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Kazakhmys Progress Recent Developments/Updates
 - 9.13.6 Kazakhmys Progress Competitive Strengths & Weaknesses
- 9.14 Shinko Chemical
 - 9.14.1 Shinko Chemical Details
 - 9.14.2 Shinko Chemical Major Business
 - 9.14.3 Shinko Chemical Elemental Selenium Product and Services
 - 9.14.4 Shinko Chemical Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Shinko Chemical Recent Developments/Updates
 - 9.14.6 Shinko Chemical Competitive Strengths & Weaknesses
- 9.15 Coherent
 - 9.15.1 Coherent Details
 - 9.15.2 Coherent Major Business
 - 9.15.3 Coherent Elemental Selenium Product and Services
 - 9.15.4 Coherent Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Coherent Recent Developments/Updates
 - 9.15.6 Coherent Competitive Strengths & Weaknesses

9.16 Nornickel

9.16.1 Nornickel Details

9.16.2 Nornickel Major Business

9.16.3 Nornickel Elemental Selenium Product and Services

9.16.4 Nornickel Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Nornickel Recent Developments/Updates

9.16.6 Nornickel Competitive Strengths & Weaknesses

9.17 KGHM Polska Miedź

9.17.1 KGHM Polska Miedź Details

9.17.2 KGHM Polska Miedź Major Business

9.17.3 KGHM Polska Miedź Elemental Selenium Product and Services

9.17.4 KGHM Polska Miedź Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 KGHM Polska Miedź Recent Developments/Updates

9.17.6 KGHM Polska Miedź Competitive Strengths & Weaknesses

9.18 Nippon Rare Metal

9.18.1 Nippon Rare Metal Details

9.18.2 Nippon Rare Metal Major Business

9.18.3 Nippon Rare Metal Elemental Selenium Product and Services

9.18.4 Nippon Rare Metal Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Nippon Rare Metal Recent Developments/Updates

9.18.6 Nippon Rare Metal Competitive Strengths & Weaknesses

9.19 Boliden AB

9.19.1 Boliden AB Details

9.19.2 Boliden AB Major Business

9.19.3 Boliden AB Elemental Selenium Product and Services

9.19.4 Boliden AB Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Boliden AB Recent Developments/Updates

9.19.6 Boliden AB Competitive Strengths & Weaknesses

9.20 Hindalco Industries

9.20.1 Hindalco Industries Details

9.20.2 Hindalco Industries Major Business

9.20.3 Hindalco Industries Elemental Selenium Product and Services

9.20.4 Hindalco Industries Elemental Selenium Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Hindalco Industries Recent Developments/Updates

9.20.6 Hindalco Industries Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Elemental Selenium Industry Chain

10.2 Elemental Selenium Upstream Analysis

10.2.1 Elemental Selenium Core Raw Materials

10.2.2 Main Manufacturers of Elemental Selenium Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Elemental Selenium Production Mode

10.6 Elemental Selenium Procurement Model

10.7 Elemental Selenium Industry Sales Model and Sales Channels

10.7.1 Elemental Selenium Sales Model

10.7.2 Elemental Selenium Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Elemental Selenium Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Elemental Selenium Production Value by Region (2021-2026) & (USD Million)

Table 3. World Elemental Selenium Production Value by Region (2027-2032) & (USD Million)

Table 4. World Elemental Selenium Production Value Market Share by Region (2021-2026)

Table 5. World Elemental Selenium Production Value Market Share by Region (2027-2032)

Table 6. World Elemental Selenium Production by Region (2021-2026) & (Tons)

Table 7. World Elemental Selenium Production by Region (2027-2032) & (Tons)

Table 8. World Elemental Selenium Production Market Share by Region (2021-2026)

Table 9. World Elemental Selenium Production Market Share by Region (2027-2032)

Table 10. World Elemental Selenium Average Price by Region (2021-2026) & (US\$/Kg)

Table 11. World Elemental Selenium Average Price by Region (2027-2032) & (US\$/Kg)

Table 12. Elemental Selenium Major Market Trends

Table 13. World Elemental Selenium Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Elemental Selenium Consumption by Region (2021-2026) & (Tons)

Table 15. World Elemental Selenium Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Elemental Selenium Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Elemental Selenium Producers in 2025

Table 18. World Elemental Selenium Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Elemental Selenium Producers in 2025

Table 20. World Elemental Selenium Average Price by Manufacturer (2021-2026) & (US\$/Kg)

Table 21. Global Elemental Selenium Company Evaluation Quadrant

Table 22. World Elemental Selenium Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Elemental Selenium Production Site of Key Manufacturer

Table 24. Elemental Selenium Market: Company Product Type Footprint

Table 25. Elemental Selenium Market: Company Product Application Footprint

Table 26. Elemental Selenium Competitive Factors

Table 27. Elemental Selenium New Entrant and Capacity Expansion Plans

Table 28. Elemental Selenium Mergers & Acquisitions Activity

Table 29. United States VS China Elemental Selenium Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Elemental Selenium Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Elemental Selenium Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Elemental Selenium Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Elemental Selenium Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Elemental Selenium Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Elemental Selenium Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Elemental Selenium Production Market Share (2021-2026)

Table 37. China Based Elemental Selenium Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Elemental Selenium Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Elemental Selenium Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Elemental Selenium Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Elemental Selenium Production Market Share (2021-2026)

Table 42. Rest of World Based Elemental Selenium Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Elemental Selenium Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Elemental Selenium Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Elemental Selenium Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Elemental Selenium Production Market

Share (2021-2026)

Table 47. World Elemental Selenium Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Elemental Selenium Production by Type (2021-2026) & (Tons)

Table 49. World Elemental Selenium Production by Type (2027-2032) & (Tons)

Table 50. World Elemental Selenium Production Value by Type (2021-2026) & (USD Million)

Table 51. World Elemental Selenium Production Value by Type (2027-2032) & (USD Million)

Table 52. World Elemental Selenium Average Price by Type (2021-2026) & (US\$/Kg)

Table 53. World Elemental Selenium Average Price by Type (2027-2032) & (US\$/Kg)

Table 54. World Elemental Selenium Production Value by Purity, (USD Million), 2021 & 2025 & 2032

Table 55. World Elemental Selenium Production by Purity (2021-2026) & (Tons)

Table 56. World Elemental Selenium Production by Purity (2027-2032) & (Tons)

Table 57. World Elemental Selenium Production Value by Purity (2021-2026) & (USD Million)

Table 58. World Elemental Selenium Production Value by Purity (2027-2032) & (USD Million)

Table 59. World Elemental Selenium Average Price by Purity (2021-2026) & (US\$/Kg)

Table 60. World Elemental Selenium Average Price by Purity (2027-2032) & (US\$/Kg)

Table 61. World Elemental Selenium Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Table 62. World Elemental Selenium Production by Sales Channel (2021-2026) & (Tons)

Table 63. World Elemental Selenium Production by Sales Channel (2027-2032) & (Tons)

Table 64. World Elemental Selenium Production Value by Sales Channel (2021-2026) & (USD Million)

Table 65. World Elemental Selenium Production Value by Sales Channel (2027-2032) & (USD Million)

Table 66. World Elemental Selenium Average Price by Sales Channel (2021-2026) & (US\$/Kg)

Table 67. World Elemental Selenium Average Price by Sales Channel (2027-2032) & (US\$/Kg)

Table 68. World Elemental Selenium Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Elemental Selenium Production by Application (2021-2026) & (Tons)

Table 70. World Elemental Selenium Production by Application (2027-2032) & (Tons)

Table 71. World Elemental Selenium Production Value by Application (2021-2026) & (USD Million)

Table 72. World Elemental Selenium Production Value by Application (2027-2032) & (USD Million)

Table 73. World Elemental Selenium Average Price by Application (2021-2026) & (US\$/Kg)

Table 74. World Elemental Selenium Average Price by Application (2027-2032) & (US\$/Kg)

Table 75. First Rare Materials Basic Information, Manufacturing Base and Competitors

Table 76. First Rare Materials Major Business

Table 77. First Rare Materials Elemental Selenium Product and Services

Table 78. First Rare Materials Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. First Rare Materials Recent Developments/Updates

Table 80. First Rare Materials Competitive Strengths & Weaknesses

Table 81. Yunnan Copper Science & Technology Development Basic Information, Manufacturing Base and Competitors

Table 82. Yunnan Copper Science & Technology Development Major Business

Table 83. Yunnan Copper Science & Technology Development Elemental Selenium Product and Services

Table 84. Yunnan Copper Science & Technology Development Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Yunnan Copper Science & Technology Development Recent Developments/Updates

Table 86. Yunnan Copper Science & Technology Development Competitive Strengths & Weaknesses

Table 87. Jinchuan Group Basic Information, Manufacturing Base and Competitors

Table 88. Jinchuan Group Major Business

Table 89. Jinchuan Group Elemental Selenium Product and Services

Table 90. Jinchuan Group Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Jinchuan Group Recent Developments/Updates

Table 92. Jinchuan Group Competitive Strengths & Weaknesses

Table 93. LS MnM Basic Information, Manufacturing Base and Competitors

Table 94. LS MnM Major Business

Table 95. LS MnM Elemental Selenium Product and Services

Table 96. LS MnM Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. LS MnM Recent Developments/Updates

Table 98. LS MnM Competitive Strengths & Weaknesses

Table 99. Mitsubishi Materials Corporation Basic Information, Manufacturing Base and Competitors

Table 100. Mitsubishi Materials Corporation Major Business

Table 101. Mitsubishi Materials Corporation Elemental Selenium Product and Services

Table 102. Mitsubishi Materials Corporation Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Mitsubishi Materials Corporation Recent Developments/Updates

Table 104. Mitsubishi Materials Corporation Competitive Strengths & Weaknesses

Table 105. RETORTE Basic Information, Manufacturing Base and Competitors

Table 106. RETORTE Major Business

Table 107. RETORTE Elemental Selenium Product and Services

Table 108. RETORTE Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. RETORTE Recent Developments/Updates

Table 110. RETORTE Competitive Strengths & Weaknesses

Table 111. PPC Basic Information, Manufacturing Base and Competitors

Table 112. PPC Major Business

Table 113. PPC Elemental Selenium Product and Services

Table 114. PPC Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. PPC Recent Developments/Updates

Table 116. PPC Competitive Strengths & Weaknesses

Table 117. Umicore Basic Information, Manufacturing Base and Competitors

Table 118. Umicore Major Business

Table 119. Umicore Elemental Selenium Product and Services

Table 120. Umicore Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Umicore Recent Developments/Updates

Table 122. Umicore Competitive Strengths & Weaknesses

Table 123. Sumitomo Metal Mining Basic Information, Manufacturing Base and Competitors

Table 124. Sumitomo Metal Mining Major Business

Table 125. Sumitomo Metal Mining Elemental Selenium Product and Services

Table 126. Sumitomo Metal Mining Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Sumitomo Metal Mining Recent Developments/Updates

Table 128. Sumitomo Metal Mining Competitive Strengths & Weaknesses
Table 129. Ural Mining and Metallurgical Company Basic Information, Manufacturing Base and Competitors
Table 130. Ural Mining and Metallurgical Company Major Business
Table 131. Ural Mining and Metallurgical Company Elemental Selenium Product and Services
Table 132. Ural Mining and Metallurgical Company Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Ural Mining and Metallurgical Company Recent Developments/Updates
Table 134. Ural Mining and Metallurgical Company Competitive Strengths & Weaknesses
Table 135. Southern Copper Corporation Basic Information, Manufacturing Base and Competitors
Table 136. Southern Copper Corporation Major Business
Table 137. Southern Copper Corporation Elemental Selenium Product and Services
Table 138. Southern Copper Corporation Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Southern Copper Corporation Recent Developments/Updates
Table 140. Southern Copper Corporation Competitive Strengths & Weaknesses
Table 141. Hefei Mengen Biotechnology Basic Information, Manufacturing Base and Competitors
Table 142. Hefei Mengen Biotechnology Major Business
Table 143. Hefei Mengen Biotechnology Elemental Selenium Product and Services
Table 144. Hefei Mengen Biotechnology Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Hefei Mengen Biotechnology Recent Developments/Updates
Table 146. Hefei Mengen Biotechnology Competitive Strengths & Weaknesses
Table 147. Kazakhmys Progress Basic Information, Manufacturing Base and Competitors
Table 148. Kazakhmys Progress Major Business
Table 149. Kazakhmys Progress Elemental Selenium Product and Services
Table 150. Kazakhmys Progress Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Kazakhmys Progress Recent Developments/Updates
Table 152. Kazakhmys Progress Competitive Strengths & Weaknesses
Table 153. Shinko Chemical Basic Information, Manufacturing Base and Competitors
Table 154. Shinko Chemical Major Business
Table 155. Shinko Chemical Elemental Selenium Product and Services

Table 156. Shinko Chemical Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Shinko Chemical Recent Developments/Updates
Table 158. Shinko Chemical Competitive Strengths & Weaknesses
Table 159. Coherent Basic Information, Manufacturing Base and Competitors
Table 160. Coherent Major Business
Table 161. Coherent Elemental Selenium Product and Services
Table 162. Coherent Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Coherent Recent Developments/Updates
Table 164. Coherent Competitive Strengths & Weaknesses
Table 165. Nornickel Basic Information, Manufacturing Base and Competitors
Table 166. Nornickel Major Business
Table 167. Nornickel Elemental Selenium Product and Services
Table 168. Nornickel Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Nornickel Recent Developments/Updates
Table 170. Nornickel Competitive Strengths & Weaknesses
Table 171. KGHM Polska Mied? Basic Information, Manufacturing Base and Competitors
Table 172. KGHM Polska Mied? Major Business
Table 173. KGHM Polska Mied? Elemental Selenium Product and Services
Table 174. KGHM Polska Mied? Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. KGHM Polska Mied? Recent Developments/Updates
Table 176. KGHM Polska Mied? Competitive Strengths & Weaknesses
Table 177. Nippon Rare Metal Basic Information, Manufacturing Base and Competitors
Table 178. Nippon Rare Metal Major Business
Table 179. Nippon Rare Metal Elemental Selenium Product and Services
Table 180. Nippon Rare Metal Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Nippon Rare Metal Recent Developments/Updates
Table 182. Nippon Rare Metal Competitive Strengths & Weaknesses
Table 183. Boliden AB Basic Information, Manufacturing Base and Competitors
Table 184. Boliden AB Major Business
Table 185. Boliden AB Elemental Selenium Product and Services
Table 186. Boliden AB Elemental Selenium Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. Boliden AB Recent Developments/Updates

Table 188. Boliden AB Competitive Strengths & Weaknesses

Table 189. Hindalco Industries Basic Information, Manufacturing Base and Competitors

Table 190. Hindalco Industries Major Business

Table 191. Hindalco Industries Elemental Selenium Product and Services

Table 192. Hindalco Industries Elemental Selenium Production (Tons), Price (US\$/Kg),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Hindalco Industries Recent Developments/Updates

Table 194. Hindalco Industries Competitive Strengths & Weaknesses

Table 195. Global Key Players of Elemental Selenium Upstream (Raw Materials)

Table 196. Global Elemental Selenium Typical Customers

Table 197. Elemental Selenium Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Elemental Selenium Picture

Figure 2. World Elemental Selenium Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Elemental Selenium Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Elemental Selenium Production (2021-2032) & (Tons)

Figure 5. World Elemental Selenium Average Price (2021-2032) & (US\$/Kg)

Figure 6. World Elemental Selenium Production Value Market Share by Region (2021-2032)

Figure 7. World Elemental Selenium Production Market Share by Region (2021-2032)

Figure 8. North America Elemental Selenium Production (2021-2032) & (Tons)

Figure 9. Europe Elemental Selenium Production (2021-2032) & (Tons)

Figure 10. China Elemental Selenium Production (2021-2032) & (Tons)

Figure 11. Japan Elemental Selenium Production (2021-2032) & (Tons)

Figure 12. Elemental Selenium Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 15. World Elemental Selenium Consumption Market Share by Region (2021-2032)

Figure 16. United States Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 17. China Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 18. Europe Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 19. Japan Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 20. South Korea Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 22. India Elemental Selenium Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Elemental Selenium by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Elemental Selenium Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Elemental Selenium Markets in 2025

Figure 26. United States VS China: Elemental Selenium Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Elemental Selenium Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Elemental Selenium Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Elemental Selenium Production Market Share 2025

Figure 30. China Based Manufacturers Elemental Selenium Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Elemental Selenium Production Market Share 2025

Figure 32. World Elemental Selenium Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Elemental Selenium Production Value Market Share by Type in 2025

Figure 34. Selenium Powder

Figure 35. Selenium Granules and Pellets

Figure 36. Selenium Ingots and Lumps

Figure 37. Other Selenium Forms

Figure 38. World Elemental Selenium Production Market Share by Type (2021-2032)

Figure 39. World Elemental Selenium Production Value Market Share by Type (2021-2032)

Figure 40. World Elemental Selenium Average Price by Type (2021-2032) & (US\$/Kg)

Figure 41. World Elemental Selenium Production Value by Purity, (USD Million), 2021 & 2025 & 2032

Figure 42. World Elemental Selenium Production Value Market Share by Purity in 2025

Figure 43. Se<99.9%

Figure 44. 99.9%?Se<99.99%

Figure 45. Se?99.99%

Figure 46. World Elemental Selenium Production Market Share by Purity (2021-2032)

Figure 47. World Elemental Selenium Production Value Market Share by Purity (2021-2032)

Figure 48. World Elemental Selenium Average Price by Purity (2021-2032) & (US\$/Kg)

Figure 49. World Elemental Selenium Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Figure 50. World Elemental Selenium Production Value Market Share by Sales Channel in 2025

Figure 51. Direct Sales

Figure 52. Distribution

Figure 53. World Elemental Selenium Production Market Share by Sales Channel (2021-2032)

Figure 54. World Elemental Selenium Production Value Market Share by Sales Channel

(2021-2032)

Figure 55. World Elemental Selenium Average Price by Sales Channel (2021-2032) & (US\$/Kg)

Figure 56. World Elemental Selenium Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Elemental Selenium Production Value Market Share by Application in 2025

Figure 58. Metallurgy

Figure 59. Agriculture and Healthcare

Figure 60. Glass Manufacturing

Figure 61. Electronics and Photovoltaics

Figure 62. Chemicals and Pigments

Figure 63. Others

Figure 64. World Elemental Selenium Production Market Share by Application (2021-2032)

Figure 65. World Elemental Selenium Production Value Market Share by Application (2021-2032)

Figure 66. World Elemental Selenium Average Price by Application (2021-2032) & (US\$/Kg)

Figure 67. Elemental Selenium Industry Chain

Figure 68. Elemental Selenium Procurement Model

Figure 69. Elemental Selenium Sales Model

Figure 70. Elemental Selenium Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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