

Global Liquid Barium Zinc Stabilizer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Liquid Barium Zinc Stabilizer market size is expected to reach \$ 896 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

In 2025, the global production of liquid barium-zinc stabilizers reached 30,750 tons, with an average selling price of US\$20/kg.

To address the problems of high toxicity and poor environmental performance of traditional lead salt and barium-cadmium heat stabilizers in PVC processing, as well as the insufficient thermal stability and poor transparency of calcium-zinc stabilizers, liquid barium-zinc stabilizers were developed. This product is an environmentally friendly PVC heat stabilizer composed of barium salts, zinc salts, and organic ligands. The core principle is that barium and zinc ions work synergistically to capture hydrogen chloride gas produced during PVC degradation, inhibiting chain degradation reactions. Simultaneously, the organic ligands improve metal ion compatibility, reduce blooming, and achieve efficient thermal stabilization of PVC materials. Since the late 20th century, with increasingly stringent global environmental regulations, liquid barium-zinc stabilizers have gradually replaced traditional toxic stabilizers, expanding from basic chemical fields to high-end PVC product processing, forming a mature industrial application system. Currently, liquid barium-zinc stabilizers have formed a complete product range covering general-purpose, transparent, and high-temperature resistant types, and are widely used in PVC films, pipes, profiles, cable materials, and medical packaging.

In 2025, the global price of liquid barium-zinc stabilizers varied significantly depending on performance specifications: the average price of general-purpose liquid barium-zinc stabilizers was approximately US\$12-18/kg, while high-end products suitable for ultra-transparent film processing could reach US\$25-32/kg. In terms of production capacity, the industry showed characteristics of 'regional concentration and overcapacity in the

mid-to-low end.' The annual production capacity of a single company line was approximately 1300-1400 tons, with an average industry capacity utilization rate of approximately 78%, and an average product gross profit margin of 17.25%.

Typical Transaction Case:

In the first quarter of 2025, a PVC artificial leather manufacturing company purchased liquid barium-zinc stabilizers from Guangdong Xinda New Materials Technology Co., Ltd., model BZ-30 series, with a total purchase volume of 20 tons and a contract value of approximately US\$320,000. The procurement technical requirements include: 'The product is a light yellow oily liquid, with metal (Ba/Zn) content meeting the standards, suitable for the production of high-end PVC leather using calendaring process; it requires a thermal stability time (180?) of ?60 minutes, good initial whiteness, no precipitation, and low migration; the product needs to pass RoHS environmental certification, and the packaging specification is 200 kg/drum.'

Industry Pain Points

The fundamental pain point of the liquid barium-zinc stabilizer industry lies in the multiple contradictions between its environmentally friendly heat stabilizer product attributes and the demands of the high-end upgrading of the PVC industry, stringent environmental standards, and the regional competitive landscape. The core pain points are specifically reflected in:

On the product side, core technological barriers are concentrated in the high-end product field. Key technologies such as metal ion dispersion technology for transparent products and high-temperature resistant formula optimization are dominated by a few overseas companies. Domestic companies lag behind in the long-term stability of high-end products (for example, under continuous processing conditions at 180?, the thermal stability time of domestic products is 12%-15% shorter than similar products from Clariant in Germany); at the same time, some small and medium-sized manufacturers suffer from formula homogenization, and their products are prone to defects such as blooming and precipitation, which lowers the overall reputation of the industry and limits penetration in high-end application fields.

On the market and regulatory side, global environmental standards are continuously upgrading. EU REACH regulations and domestic GB 9685-2016 standards impose stringent requirements on heavy metal residues and VOC content, resulting in high investment and costs for compliance upgrades for domestic small and medium-sized enterprises; the market presents a typical 'regional oligopoly' pattern, with the domestic market mainly occupied by leading enterprises in East and South China. Small and medium-sized manufacturers in these regions are trapped in low-price competition, while overseas brands have a first-mover advantage in the high-end market. Domestic enterprises are at a disadvantage in brand influence and customer certification system construction, further compressing profit margins and innovation momentum. Industry

Chain Structure

The upstream supply of liquid barium-zinc stabilizers is centered around core materials such as barium salts (derived from barite in Tianzhu County, Guizhou Province), zinc salts (processed from zinc ingots from China/Australia), organic ligands (fatty acids/alcohols from domestic petrochemical companies), and environmentally friendly ester solvents. These are combined with key components such as antioxidants and chelating agents (dominated by German and American companies in the high-end market), and dispersants (domestically available alternatives). This is supported by formula optimization technology (collaborations between universities and companies), precision mixing equipment (German and Japanese imports are gradually being replaced by domestic products), and environmental testing technology (third-party/corporate laboratories). In downstream applications, PVC film accounts for 38% (mainly food/agricultural/industrial packaging films, with demand for ultra-transparent films driving a 15% annual increase in high-end stabilizers), PVC pipes/profiles account for 32% (building water supply/drainage/door and window profiles, benefiting from infrastructure and renovation projects), cable materials account for 15% (insulation layers for wires and cables, with new energy/power grids driving demand for high-temperature resistant products), and other fields account for 15% (medical-grade PVC products/appliance casings/toys, etc., with significant growth potential for high-value-added food/medical-grade products). **Industry Trends and Challenges**

The liquid barium-zinc stabilizer market is exhibiting three major trends: high-end development (the proportion of high-performance formulations with low migration, low VOC, high transparency, and high-temperature resistance will increase from the current 20% to 35% by 2032), green development (application of natural organic ligands/renewable solvents, reduced process energy consumption, and improved biodegradability to adapt to environmentally friendly PVC), and accelerated localization (breakthroughs in high-end transparent/medical-grade products, with domestic market penetration increasing from 72% to 85% by 2032). Competitiveness is being enhanced through an integrated 'raw materials-intermediates-stabilizers-applications' industrial chain layout (such as the transformation of barium resource production areas in Tianzhu County, Guizhou Province). Opportunities include a global environmentally friendly stabilizer market size reaching US\$5.8 billion by 2025 (US\$1.8 billion in China), an annual shortage of 30,000 tons in emerging fields such as ultra-transparent films/medical-grade PVC, and a 13% annual increase in demand driven by policy-driven technological upgrades and procurement. Challenges include a 30% dependence on imports for high-end formulation technologies/key additives, increased compliance costs for small and medium-sized enterprises due to upgraded environmental standards, low-price competition and homogenization in the low-to-medium-end market compressing profits, and technological barriers and brand advantages of overseas brands hindering

market penetration. Demand and Market Opportunity Analysis

The demand for liquid barium-zinc stabilizers is driven by several factors: the essential need for PVC industry upgrades (food-grade/medical-grade products require 5-8 times higher transparency, stability, and environmental performance from heat stabilizers, with high-end products improving the pass rate by 8%-12% and reducing the defect rate to below 0.5%); mandatory environmental policies (tightening global standards such as EU REACH, domestic bans on lead salts, and an estimated annual replacement demand of 25,000 tons between 2025 and 2030); and growth in emerging fields (a 22% annual increase in demand from new energy vehicle cables, biodegradable materials, and electronic insulation materials). Technological advantages include multi-scenario compatibility (suitable for a full range of applications from ordinary pipes to high-end medical products, with customized products meeting special requirements such as high temperature, high transparency, and low migration, achieving an 82% coverage rate); efficiency and cost optimization (good mixing and dispersion properties shorten mixing time by 15%-20%, reduce energy consumption by 5%-8%, and lower overall costs by 10%-15%); and the benefits of domestic substitution (breakthroughs in core domestic formulations and localized supply chains improve cost-effectiveness, with companies like Guangdong Weilina achieving a 28% bidding success rate in the domestic high-end market in 2025, a 10 percentage point increase compared to 2023, and a global market share of 3.2%).

This report studies the global Liquid Barium Zinc Stabilizer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Liquid Barium Zinc Stabilizer 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 Liquid Barium Zinc Stabilizer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Liquid Barium Zinc Stabilizer total production and demand, 2021-2032, (Tons)

Global Liquid Barium Zinc Stabilizer total production value, 2021-2032, (USD Million)

Global Liquid Barium Zinc Stabilizer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Liquid Barium Zinc Stabilizer consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Liquid Barium Zinc Stabilizer domestic production, consumption, key domestic manufacturers and share

Global Liquid Barium Zinc Stabilizer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Liquid Barium Zinc Stabilizer production by Type, production, value, CAGR,

2021-2032, (USD Million) & (Tons)

Global Liquid Barium Zinc Stabilizer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Liquid Barium Zinc Stabilizer 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 Clariant, BASF, Guangdong Weilina New Material Technology, Valtris, Evonik, Arkema, SONGWON, Baerlocher, Adeka, Galata Chemicals, 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 Liquid Barium Zinc Stabilizer 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 Liquid Barium Zinc Stabilizer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Liquid Barium Zinc Stabilizer Market, Segmentation by Type:

General Purpose

Transparent

High Temperature Resistant

Global Liquid Barium Zinc Stabilizer Market, Segmentation by Environmental Protection Level:

Standard Environmental Protection

Food Grade/Medical Grade

Global Liquid Barium Zinc Stabilizer Market, Segmentation by Formulation System:

Single Barium-Zinc

Composite

Global Liquid Barium Zinc Stabilizer Market, Segmentation by Application:

PVC Film

PVC Pipes/Profiles

Cable Compounds

Other

Companies Profiled:

Clariant

BASF

Guangdong Weilina New Material Technology

Valtris

Evonik

Arkema

SONGWON

Baerlocher

Adeka

Galata Chemicals

Westlake Akishima

Pau Tai

Pishro Chem

Sun Ace Kakoh

Novista Group

AM Stabilizers

Baoxu Chemical

WSD chemical

Xinda Technology

Jiarenhe Technology

TopJoy Chemical

Alliance Chemistry

Modern Chemicals and Plastics

GYC

Key Questions Answered:

1. How big is the global Liquid Barium Zinc Stabilizer market?
2. What is the demand of the global Liquid Barium Zinc Stabilizer market?
3. What is the year over year growth of the global Liquid Barium Zinc Stabilizer market?
4. What is the production and production value of the global Liquid Barium Zinc Stabilizer market?
5. Who are the key producers in the global Liquid Barium Zinc Stabilizer market?
6. What are the growth factors driving the market demand?

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