

Global Mining Solvent Extractants Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mining Solvent Extractants market size is expected to reach \$ 903 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

In 2025, global sales of Mining Solvent Extractants reached approximately 80 k tons, with an average market price of about USD 7000 ton, an annual production capacity of roughly 95 k tons, and an industry-average gross margin of approximately 30%.

Mining Solvent Extractants are industrial organic functional chemicals used in hydrometallurgical solvent extraction processes to selectively transfer target metal ions or metal-complex species from an aqueous phase into an organic phase through complexation, chelation, cation exchange, anion exchange, or solvating mechanisms, followed by stripping, washing, regeneration, and recycling of the organic phase. This study focuses on active extractants and formulated extractant systems used in industrial metal separation and recovery, including hydroxyoxime copper extractants, acidic organophosphorus extractants, neutral organophosphorus solvating extractants, amine and quaternary ammonium extractants, carboxylic acid extractants, and customized systems for lithium, rare earths, battery black mass, uranium, vanadium, molybdenum, nickel, cobalt, manganese, and high-purity metal production. Key performance parameters include selectivity, distribution ratio, loading capacity, phase disengagement, stripping efficiency, organic loss, chemical stability, impurity tolerance, compatibility with diluents and modifiers, cycle life, and industrial safety and environmental performance.

Based on our research, Mining Solvent Extractants should be treated as functional hydrometallurgical materials rather than generic commodity chemicals. The mature base of the market is supported by copper SX-EW, rare earth separation, uranium

extraction, and conventional nickel-cobalt separation, while the growth layer is increasingly linked to battery black mass recycling, laterite processing, lithium brines, rare earth supply security, and high-purity metal production. The industry's entry barriers are not defined only by chemical synthesis capacity. Long-term process validation, phase behavior stability, selectivity under complex impurity profiles, organic loss control, and technical support at the customer's solvent extraction circuit are equally important. Once an extractant is validated in a continuous hydrometallurgical flow sheet, switching costs are high, which gives established suppliers strong customer stickiness.

Demand growth is expected to be more resilient than that of ordinary mining reagents because the product is tied to critical minerals and downstream electrification. Copper provides the mature volume base, while nickel, cobalt, manganese, lithium, and battery recycling provide incremental growth. Rare earth and scandium separation may show stronger policy-driven volatility, especially as governments and downstream manufacturers seek more secure supply chains. China's export control actions related to certain rare earth production extractants further highlight the strategic relevance of P204/P507-type products in critical mineral supply chains. This does not mean that all suppliers will benefit equally; the advantage will accrue to companies with proven industrial performance, stable quality, local regulatory compliance, and the ability to support customers during scale-up.

The main substitution risks come from ion exchange resins, adsorption materials, membranes, precipitation routes, and certain direct lithium extraction technologies. However, solvent extraction remains difficult to displace in many large-scale continuous hydrometallurgical circuits because it offers high throughput, adjustable selectivity, proven scale-up, and established process economics. Over the next cycle, competitive differentiation is likely to move toward low-loss formulations, greener diluent compatibility, faster phase disengagement, improved impurity tolerance, and regionally resilient supply chains. Suppliers that combine chemistry, formulation know-how, application engineering, and local manufacturing will be better positioned than companies offering only generic chemical intermediates.

This report studies the global Mining Solvent Extractants production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Mining Solvent Extractants total production and demand, 2021-2032, (Kilotons)

Global Mining Solvent Extractants total production value, 2021-2032, (USD Million)

Global Mining Solvent Extractants production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Mining Solvent Extractants consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Mining Solvent Extractants domestic production, consumption, key domestic manufacturers and share

Global Mining Solvent Extractants production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Mining Solvent Extractants production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Mining Solvent Extractants production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Mining Solvent Extractants 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 ZIJIN, Syensqo, Deyuan Chemical, BASF, KopperChem, Italmatch, DAIHACHI Chemical, Sanmenxia Zhongda Chemical, Sannuo Chemical, Jiangxi Jiexin, 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 Mining Solvent Extractants market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Mining Solvent Extractants Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mining Solvent Extractants Market, Segmentation by Type:

Copper Extractant

New Energy Metal Extractant (Cobalt, Nickel, etc.)

Others

Global Mining Solvent Extractants Market, Segmentation by Form:

Neat Active Extractants

Formulated Extractant Blends

Global Mining Solvent Extractants Market, Segmentation by Extraction Mechanism:

Cation Exchange

Anion Exchange

Global Mining Solvent Extractants Market, Segmentation by Application:

Mineral Processing

Metallurgy

Others

Companies Profiled:

ZIJIN

Syensqo

Deyuan Chemical

BASF

KopperChem

Italmatch

DAIHACHI Chemical

Sanmenxia Zhongda Chemical

Sannuo Chemical

Jiangxi Jiexin

Key Questions Answered:

1. How big is the global Mining Solvent Extractants market?
2. What is the demand of the global Mining Solvent Extractants market?

3. What is the year over year growth of the global Mining Solvent Extractants market?
4. What is the production and production value of the global Mining Solvent Extractants market?
5. Who are the key producers in the global Mining Solvent Extractants market?
6. What are the growth factors driving the market demand?

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