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Global Odor Control Zeolite Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Odor Control Zeolite market size is expected to reach $ 653 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Odor Control Zeolites are functional inorganic adsorbent materials based on natural zeolites, synthetic zeolites, or engineered zeolites produced through ion exchange, surface modification, metal-ion loading, pore-structure engineering, and particle engineering. They utilize the ordered microporous crystalline structure, relatively high surface area, molecular-sieving characteristics, selective adsorption behavior, and ion-exchange capacity of zeolites to capture, immobilize, reduce, or control ammonia, hydrogen sulfide, mercaptans, amines, aldehydes, organic acids, and other malodorous volatile organic compounds. Commercial products are supplied in forms including powders, fine powders, granules, beads, agglomerates, pellets, and other engineered particles.

The global odor control zeolites market is a growing niche functional materials market composed of both natural odor control zeolites and synthetic/engineered odor control zeolites. One of the market's most distinctive structural characteristics is the divergence between volume and value. Natural zeolites, supported by their relatively low cost and high consumption volumes, account for the majority of demand by tonnage in livestock farming, waste management, wastewater treatment, and broader environmental odor-control applications. Synthetic and engineered zeolites, although representing a smaller share of total volume, benefit from high-silica hydrophobic structures, ion-exchange modification, selective molecular adsorption, and precise particle engineering, and are estimated to contribute approximately 80% of global market revenue in 2025. From a demand perspective, industrial odor control remains the largest individual application segment, accounting for an estimated 31% of the global market in 2025. Major use

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cases include odor and malodor control in chemical processing, plastics manufacturing, coating operations, recycling and recycled-material processing, and other industrial production environments. Solid-waste and refuse management, wastewater and sewage treatment, and agricultural and livestock applications form the core demand base for natural odor control zeolites. At the same time, “Other Applications” are estimated to represent approximately 25% of market value and are emerging as one of the most strategically important growth areas. These applications include personal care and deodorant products, household and indoor odor control, pet and sanitary products, textiles and nonwovens, automotive interiors, packaging and polymers, as well as coatings and adhesives. From the supply perspective, the industry exhibits a clear two-tier competitive structure. On one side, Japan, Switzerland, France, Italy, and other developed specialty-material markets host a group of suppliers focused on high-silica zeolites, hydrophobic zeolites, ion-exchanged zeolites, and other engineered zeolite materials. Competition among these suppliers has increasingly shifted from simply providing adsorption materials toward pore-size engineering, Si/Al ratio optimization, hydrophilic/hydrophobic property control, selective adsorption performance, particle engineering, and compatibility with downstream formulations. On the other side, the United States, Türkiye, Eastern Europe, Australia, Mexico, and selected Asian countries possess relatively abundant natural clinoptilolite resources and processing capacity, resulting in a more fragmented supply model characterized by regional mining, mineral processing, and downstream application development. Recent industry developments further indicate that odor control zeolites are moving toward greater specialization, higher-value applications, and increasingly globalized supply chains. SAES has introduced ZeoSAES® DeoPrecision for stick and roll-on deodorant formulations, using engineered zeolite as a single INCI active ingredient and emphasizing selective control of key malodor VOCs, illustrating the expansion of zeolites from conventional environmental adsorbents into higher-value personal care formulations. Zeochem has continued to strengthen its global materials and adsorption platform through investment and acquisitions: in 2024, it completed the acquisitions of Sorbead India and Swambe Chemicals, expanding its molecular-sieve distribution and supply capabilities in India; in 2025, it acquired Canada-based SiliCycle, further strengthening its North American manufacturing, R&D, and high-performance separation materials platform. Consolidation is also taking place within the natural zeolite supply chain in Japan, where Veolia acquired 100% of Zeeklite in 2025, integrating natural zeolite mining and sales capabilities with the broader waste-management and environmental-services operations of a major global environmental group.

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Report Scope

This report studies the global Odor Control Zeolite production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Odor Control Zeolite total production and demand, 2021-2032, (Kilotons)

Global Odor Control Zeolite total production value, 2021-2032, (USD Million)

Global Odor Control Zeolite production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Odor Control Zeolite consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Odor Control Zeolite domestic production, consumption, key domestic manufacturers and share

Global Odor Control Zeolite production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Odor Control Zeolite production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Odor Control Zeolite production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Odor Control Zeolite market based on the

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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 Zeochem, Clariant, SAES Getters, Honeywell UOP, Resonac Universal, Arkema, Tosoh, Sinanen Zeomic, Mizusawa Industrial Chemicals, Nitto Funka Kogyo, 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 Odor Control Zeolite 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 Odor Control Zeolite Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Odor Control Zeolite Market, Segmentation by Type:

Synthetic Odor Control Zeolites

Natural Odor Control Zeolites

Global Odor Control Zeolite Market, Segmentation by Material Properties:

Hydrophobic Odor Control Zeolites

Hydrophilic Odor Control Zeolites

Global Odor Control Zeolite Market, Segmentation by Application:

Industrial Odor & VOC Control

Solid Waste & Waste Handling Odor Control

Wastewater & Sewage Odor Control

Agriculture, Livestock & Aquaculture Odor Control

Personal Care & Deodorants

Household & Indoor Odor Control

Pet & Sanitary Products

Plastics, Packaging & Automotive Materials

Textiles, Coatings & Other Functional Materials

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Companies Profiled:

Zeochem

Clariant

SAES Getters

Honeywell UOP

Resonac Universal

Arkema

Tosoh

Sinanen Zeomic

Mizusawa Industrial Chemicals

Nitto Funka Kogyo

Zeeklite

KMI Zeolite

Ida-Ore

United States Antimony (Bear River Zeolite)

St. Cloud Mining

Zeotech Corp.

Pacific Minerals Group

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ZEO, Inc.

Zeocem

Mevex (Zeotex)

Esen Zeolite

Zeolite Australia

Bentonisa (CLINOMAX)

Xiamen Zeolitemin Biotech

Tianjin NK Catalyst

Dalian Daxi Adsorbent

Teague Mineral Products

Thracean Zeolite

PT Excellent Zeolit Indonesia

Rota Mining

Zeolita Origen

Zeomex

Key Questions Answered

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

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