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Global Zinc-Air Battery Catalysts Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Zinc-Air Battery Catalysts market size is expected to reach $ 18.87 million by 2032, rising at a market growth of 10.8% CAGR during the forecast period (2026-2032).

Zinc-Air Battery Catalysts are functional catalytic materials used in the air electrode of zinc-air batteries to accelerate oxygen electrochemical reactions and improve discharge performance, energy efficiency, power capability, and operating durability. In primary zinc-air batteries, catalysts mainly promote the oxygen reduction reaction (ORR), while electrically rechargeable zinc-air systems require oxygen evolution reaction (OER) activity or bifunctional ORR/OER catalytic capability during repeated charge-discharge operation. Commercial and emerging material routes include manganese-based catalysts, silver-based catalysts, platinum-group-metal-based catalysts, metal-nitrogen-carbon catalysts, other non-precious transition-metal-based catalysts, and metal-free carbon catalysts. Products are supplied mainly as dry catalyst powders, supported catalysts, dispersions, inks, slurries, and other formulations for air-electrode fabrication. This study focuses on catalyst materials supplied for zinc-air battery applications, covering primary batteries for hearing aids, medical and specialty electronics as well as rechargeable systems for stationary energy storage, backup power, telecom and other emerging applications. The market scope is defined by the commercial value of the catalytic material itself rather than the value of the complete air cathode or battery system.

Key Findings

The global weighted average selling price of zinc-air battery catalysts was approximately US$35–50/kg in 2025.

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Primary zinc-air batteries remained the main demand source, while rechargeable zinc-air batteries represented the key growth direction.

Manganese-based catalysts remained the largest product type.

Hearing aids and medical devices remained the largest downstream application.

Stationary energy storage was the fastest-growing application.

Non-precious-metal ORR catalysts and bifunctional ORR/OER catalysts continued to gain importance.

The United States, Japan, and China remained the major technology and supply regions.

Market Trends

The technology direction is shifting from conventional low-cost manganese-based ORR catalysts toward higher-activity non-precious-metal formulations and rechargeable-battery-oriented ORR/OER systems. For primary zinc-air cells, catalyst development remains focused on cost, durability, oxygen transport and consistency in mass production. For rechargeable systems, the technical requirement is more demanding because the air electrode must sustain reversible oxygen chemistry over repeated cycling, making bifunctional activity and electrochemical durability increasingly important. The U.S. Department of Energy identifies cathode-material optimization, new material discovery, demonstration projects and manufacturing ecosystem development among the important innovation areas for zinc battery commercialization.

Another important trend is the transition from catalyst powder sales toward application-specific material engineering. Catalyst suppliers increasingly combine active-material synthesis with carbon-support selection, dispersion, ink formulation, coating and electrode optimization. This raises the value contribution of formulation know-how and scale-up capability relative to the underlying raw material alone. Commercial suppliers are already positioning catalyst libraries, customized supports and electrode processing as integrated development capabilities.

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Market Dynamics

Drivers

The mature installed base of zinc-air hearing-aid batteries provides a relatively stable demand foundation for conventional catalysts, while long-duration energy storage creates the most important new demand pathway. Primary zinc-air button cells remain widely used in hearing aids, and the U.S. Department of Energy continues to identify zinc-air among zinc battery chemistries being developed for stationary and long-duration storage. Increasing emphasis on non-flammable aqueous battery chemistries, resource availability and reduced reliance on scarce precious metals also supports catalyst innovation.

Restraints

The main restraint is the different commercialization profile of the two major downstream markets. Conventional primary zinc-air batteries are technologically mature but face structural competition from rechargeable lithium-ion hearing-aid solutions; VARTA currently supplies both zinc-air and rechargeable lithium-ion solutions for hearing-aid applications. Rechargeable zinc-air batteries, by contrast, offer a larger long-term catalyst opportunity but still face cycle-life, reversible air-electrode efficiency, material stability and system-scale manufacturing challenges. The U.S. Department of Energy assessed the broader zinc-battery field at an intermediate stage of technology and manufacturing readiness, highlighting the remaining commercialization gap.

Opportunities

The strongest opportunity is the substitution of precious-metal catalysts with scalable non-precious-metal alternatives. Commercial rare-metal-free ORR technology is already being designed for metal-air batteries, and one current commercial platform reports mass-production suitability without special chemical processing and targets substantially lower catalyst cost than platinum-based alternatives. A second opportunity lies in the commercialization of rechargeable zinc-air systems for stationary storage, where catalyst suppliers can capture value not only from active materials but also from catalyst-support design, ink formulation, coating and optimized air-electrode integration. A zinc-air long-duration storage collaboration announced in 2024 specifically targeted a non-precious-metal catalyst-coated air electrode to reduce cathode material cost.

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Challenges

Catalyst performance cannot be evaluated by initial ORR or OER activity alone. Commercial success increasingly depends on durability under alkaline conditions, resistance to catalyst degradation, repeatable dispersion and coating quality, electrode-level mass transport, scale-up yield and customer qualification. Rechargeable systems add the difficulty of balancing ORR and OER performance in either a bifunctional catalyst or a coordinated multi-catalyst architecture. At the industry level, limited standardized testing protocols and relatively immature manufacturing ecosystems for emerging zinc storage technologies can slow the translation of laboratory catalyst performance into bankable commercial battery systems.

Industry Chain Analysis

The upstream chain includes manganese compounds, silver and platinum-group-metal precursors, iron, cobalt and nickel compounds, carbon supports, heteroatom precursors, solvents, binders and other formulation materials. Midstream activities comprise catalyst synthesis, active-site engineering, loading onto carbon or oxide supports, particle and surface control, dispersion, ink or slurry formulation, quality testing and scale-up manufacturing. Downstream customers include air-electrode manufacturers and zinc-air battery producers serving hearing aids, medical and specialty electronics, stationary storage, backup power and telecom applications. The catalyst industry therefore sits between commodity or specialty chemical inputs and highly application-specific electrochemical electrode manufacturing.

Value Chain Analysis

Value creation is moving away from simple raw-material conversion toward engineered catalytic performance and electrode compatibility. Conventional manganese-based materials compete heavily on consistency, cost and volume manufacturing, while advanced non-precious-metal and bifunctional catalysts derive a larger share of value from active-site design, proprietary synthesis, support selection, dispersion technology and application validation. Suppliers able to move from laboratory synthesis to pilot and commercial-scale production have a stronger competitive position because battery developers require reproducible electrochemical performance across progressively larger batches. Nexceris explicitly positions its electrochemical development capability

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around material synthesis, component development and scale-up, while AZUL Energy combines catalyst development with support selection, dispersion and sheet-fabrication know-how.

Segment Insights

By primary active material, manganese-based catalysts remain the largest segment because of their established position in conventional zinc-air air electrodes and favorable cost structure. Silver-based and platinum-group-metal-based catalysts occupy specialized higher-cost applications, while metal-nitrogen-carbon, other non-precious transition-metal-based and metal-free carbon catalysts are strategically important development directions. By catalytic function, ORR catalysts dominate current commercial consumption because primary zinc-air batteries represent the largest installed demand base. Bifunctional ORR/OER catalysts have a smaller current commercial base but higher strategic importance in electrically rechargeable zinc-air systems.

By battery type, primary zinc-air batteries continue to account for the majority of catalyst demand, while rechargeable zinc-air batteries are expected to contribute a rising share of incremental demand. By product form, dry catalyst powders remain the basic commercial format, but dispersions, inks and slurries are gaining importance as suppliers move closer to air-electrode processing. Application-specific formulation capability can also command a higher value contribution than undifferentiated catalyst powder.

Downstream Market Opportunities

Hearing aids and medical devices remain the core established downstream market and provide recurring replacement demand for primary zinc-air cells. However, the opportunity is primarily stable-volume rather than disruptive growth because rechargeable lithium-ion hearing-aid technologies are increasingly available alongside zinc-air products. Stationary energy storage offers a fundamentally different growth profile. Zinc-air technologies are being evaluated for microgrids, renewable-energy integration, behind-the-meter storage and long-duration discharge, creating potential demand for higher-value non-precious-metal and bifunctional catalysts if project deployment scales.

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Regional Insights

North America is an important development and scale-up region, supported by electrochemical materials engineering, pilot manufacturing capabilities and zinc-air long-duration storage development. The region is particularly relevant for custom catalyst development and the transition from laboratory materials to larger production batches.

Japan has emerged as an important commercialization center for advanced rare-metal-free ORR catalysts, with commercial products explicitly targeting metal-air battery applications and moving from customized project supply toward standardized availability. China has a broader manufacturing base in manganese materials, battery materials and air-electrode catalyst production, giving it potential cost and scale advantages as rechargeable zinc-air commercialization expands. Europe remains an important demand and battery-technology region, particularly in hearing-aid zinc-air cells and advanced electrochemical materials, although the verified specialized zinc-air catalyst supplier base is currently less concentrated.

Competitive Landscape Analysis

The competitive landscape remains fragmented and technically differentiated rather than dominated by a large number of scaled dedicated zinc-air catalyst manufacturers. North America is characterized by strong material scale-up and contract-development capabilities, Japan by specialized high-performance non-precious-metal catalyst commercialization, and China by its broader manganese and battery-material manufacturing foundation. This creates competition between established low-cost catalyst chemistry and emerging proprietary electrocatalyst platforms rather than a conventional commodity-material market.

Entry barriers are increasingly defined by repeatable electrochemical performance, scale-up know-how, customer-specific formulation, air-electrode integration and manufacturing quality control. As rechargeable zinc-air applications develop, regional competition is expected to shift toward companies and supply chains capable of combining catalyst performance with scalable electrode manufacturing. Given the still-specialized supplier structure and limited disclosure of zinc-air-specific catalyst revenue, the market is better characterized by technology positioning and manufacturing capability than by precise public market-share rankings.

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Report Scope

This report studies the global Zinc-Air Battery Catalysts production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Zinc-Air Battery Catalysts 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 Zinc-Air Battery Catalysts that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Zinc-Air Battery Catalysts total production and demand, 2021-2032, (Tons)

Global Zinc-Air Battery Catalysts total production value, 2021-2032, (USD Million)

Global Zinc-Air Battery Catalysts production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Zinc-Air Battery Catalysts consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Zinc-Air Battery Catalysts domestic production, consumption, key domestic manufacturers and share

Global Zinc-Air Battery Catalysts production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Zinc-Air Battery Catalysts production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Zinc-Air Battery Catalysts production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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This report profiles key players in the global Zinc-Air Battery Catalysts 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 Nexceris, LLC, Hunan Yuanda New Materials Co., Ltd., AZUL Energy Inc., Cerpotech AS, 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 Zinc-Air Battery Catalysts 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 Zinc-Air Battery Catalysts Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Zinc-Air Battery Catalysts Market, Segmentation by Type:

ORR Catalysts

OER Catalysts

Bifunctional ORR/OER Catalysts

Others

Global Zinc-Air Battery Catalysts Market, Segmentation by Primary Active Material:

Manganese Based Catalysts

Silver Based Catalysts

Platinum Group Metal Based Catalysts

Metal Nitrogen Carbon Catalysts

Other Non Precious Transition Metal Based Catalysts

Metal Free Carbon Catalysts

Others

Global Zinc-Air Battery Catalysts Market, Segmentation by Product Form:

Dry Catalyst Powders

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Catalyst Dispersions and Inks

Catalyst Pastes and Slurries

Others

Global Zinc-Air Battery Catalysts Market, Segmentation by Application:

Hearing Aids and Medical Devices

Consumer and Specialty Electronics

Stationary Energy Storage

Backup Power and Telecom

Research and Demonstration

Others

Companies Profiled:

Nexceris, LLC

Hunan Yuanda New Materials Co., Ltd.

AZUL Energy Inc.

Cerpotech AS

Key Questions Answered

1. How big is the global Zinc-Air Battery Catalysts market?
2. What is the demand of the global Zinc-Air Battery Catalysts market?

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3. What is the year over year growth of the global Zinc-Air Battery Catalysts market?
4. What is the total value of the global Zinc-Air Battery Catalysts market?
5. Who are the Major Players in the global Zinc-Air Battery Catalysts market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Zinc-Air Battery Catalysts Production Value by Manufacturer (2021-2026)

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3.2 World Zinc-Air Battery Catalysts Production by Manufacturer (2021-2026)
3.3 World Zinc-Air Battery Catalysts Average Price by Manufacturer (2021-2026)
3.4 Zinc-Air Battery Catalysts Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Zinc-Air Battery Catalysts Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Zinc-Air Battery Catalysts in 2025
  3.5.3 Global Concentration Ratios (CR8) for Zinc-Air Battery Catalysts in 2025
3.6 Zinc-Air Battery Catalysts Market: Overall Company Footprint Analysis
  3.6.1 Zinc-Air Battery Catalysts Market: Region Footprint
  3.6.2 Zinc-Air Battery Catalysts Market: Company Product Type Footprint
  3.6.3 Zinc-Air Battery Catalysts 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: Zinc-Air Battery Catalysts Production Value Comparison
  4.1.1 United States VS China: Zinc-Air Battery Catalysts Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Zinc-Air Battery Catalysts Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Zinc-Air Battery Catalysts Production Comparison
  4.2.1 United States VS China: Zinc-Air Battery Catalysts Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Zinc-Air Battery Catalysts Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Zinc-Air Battery Catalysts Consumption Comparison
  4.3.1 United States VS China: Zinc-Air Battery Catalysts Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Zinc-Air Battery Catalysts Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Zinc-Air Battery Catalysts Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (States, Country)

+357 96 030922
info@marketpublishers.com

4.4.2 United States Based Manufacturers Zinc-Air Battery Catalysts Production Value (2021-2026)
4.4.3 United States Based Manufacturers Zinc-Air Battery Catalysts Production (2021-2026)
4.5 China Based Zinc-Air Battery Catalysts Manufacturers and Market Share
4.5.1 China Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Zinc-Air Battery Catalysts Production Value (2021-2026)
4.5.3 China Based Manufacturers Zinc-Air Battery Catalysts Production (2021-2026)
4.6 Rest of World Based Zinc-Air Battery Catalysts Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Zinc-Air Battery Catalysts Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 ORR Catalysts
5.2.2 OER Catalysts
5.2.3 Bifunctional ORR/OER Catalysts
5.2.4 Others
5.3 Market Segment by Type
5.3.1 World Zinc-Air Battery Catalysts Production by Type (2021-2032)
5.3.2 World Zinc-Air Battery Catalysts Production Value by Type (2021-2032)
5.3.3 World Zinc-Air Battery Catalysts Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PRIMARY ACTIVE MATERIAL

6.1 World Zinc-Air Battery Catalysts Market Size Overview by Primary Active Material: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Primary Active Material
6.2.1 Manganese Based Catalysts

+357 96 030922
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6.2.2 Silver Based Catalysts
6.2.3 Platinum Group Metal Based Catalysts
6.2.4 Metal Nitrogen Carbon Catalysts
6.2.5 Other Non Precious Transition Metal Based Catalysts
6.2.6 Metal Free Carbon Catalysts
6.2.7 Others
6.3 Market Segment by Primary Active Material
6.3.1 World Zinc-Air Battery Catalysts Production by Primary Active Material (2021-2032)
6.3.2 World Zinc-Air Battery Catalysts Production Value by Primary Active Material (2021-2032)
6.3.3 World Zinc-Air Battery Catalysts Average Price by Primary Active Material (2021-2032)

7 MARKET ANALYSIS BY PRODUCT FORM

7.1 World Zinc-Air Battery Catalysts Market Size Overview by Product Form: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Product Form
7.2.1 Dry Catalyst Powders
7.2.2 Catalyst Dispersions and Inks
7.2.3 Catalyst Pastes and Slurries
7.2.4 Others
7.3 Market Segment by Product Form
7.3.1 World Zinc-Air Battery Catalysts Production by Product Form (2021-2032)
7.3.2 World Zinc-Air Battery Catalysts Production Value by Product Form (2021-2032)
7.3.3 World Zinc-Air Battery Catalysts Average Price by Product Form (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Zinc-Air Battery Catalysts Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Hearing Aids and Medical Devices
8.2.2 Consumer and Specialty Electronics
8.2.3 Stationary Energy Storage
8.2.4 Backup Power and Telecom
8.2.5 Research and Demonstration
8.2.6 Others

+357 96 030922
info@marketpublishers.com

8.3 Market Segment by Application
8.3.1 World Zinc-Air Battery Catalysts Production by Application (2021-2032)
8.3.2 World Zinc-Air Battery Catalysts Production Value by Application (2021-2032)
8.3.3 World Zinc-Air Battery Catalysts Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Nexceris, LLC
9.1.1 Nexceris, LLC Details
9.1.2 Nexceris, LLC Major Business
9.1.3 Nexceris, LLC Zinc-Air Battery Catalysts Product and Services
9.1.4 Nexceris, LLC Zinc-Air Battery Catalysts Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Nexceris, LLC Recent Developments/Updates
9.1.6 Nexceris, LLC Competitive Strengths & Weaknesses
9.2 Hunan Yuanda New Materials Co., Ltd.
9.2.1 Hunan Yuanda New Materials Co., Ltd. Details
9.2.2 Hunan Yuanda New Materials Co., Ltd. Major Business
9.2.3 Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Product and Services
9.2.4 Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Hunan Yuanda New Materials Co., Ltd. Recent Developments/Updates
9.2.6 Hunan Yuanda New Materials Co., Ltd. Competitive Strengths & Weaknesses
9.3 AZUL Energy Inc.
9.3.1 AZUL Energy Inc. Details
9.3.2 AZUL Energy Inc. Major Business
9.3.3 AZUL Energy Inc. Zinc-Air Battery Catalysts Product and Services
9.3.4 AZUL Energy Inc. Zinc-Air Battery Catalysts Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 AZUL Energy Inc. Recent Developments/Updates
9.3.6 AZUL Energy Inc. Competitive Strengths & Weaknesses
9.4 Cerpotech AS
9.4.1 Cerpotech AS Details
9.4.2 Cerpotech AS Major Business
9.4.3 Cerpotech AS Zinc-Air Battery Catalysts Product and Services
9.4.4 Cerpotech AS Zinc-Air Battery Catalysts Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Cerpotech AS Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.4.6 Cerpotech AS Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Zinc-Air Battery Catalysts Industry Chain
10.2 Zinc-Air Battery Catalysts Upstream Analysis
10.2.1 Zinc-Air Battery Catalysts Core Raw Materials
10.2.2 Main Manufacturers of Zinc-Air Battery Catalysts Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Zinc-Air Battery Catalysts Production Mode
10.6 Zinc-Air Battery Catalysts Procurement Model
10.7 Zinc-Air Battery Catalysts Industry Sales Model and Sales Channels
10.7.1 Zinc-Air Battery Catalysts Sales Model
10.7.2 Zinc-Air Battery Catalysts Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Zinc-Air Battery Catalysts Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Zinc-Air Battery Catalysts Production Value by Region (2021-2026) & (USD Million)
Table 3. World Zinc-Air Battery Catalysts Production Value by Region (2027-2032) & (USD Million)
Table 4. World Zinc-Air Battery Catalysts Production Value Market Share by Region (2021-2026)
Table 5. World Zinc-Air Battery Catalysts Production Value Market Share by Region (2027-2032)
Table 6. World Zinc-Air Battery Catalysts Production by Region (2021-2026) & (Tons)
Table 7. World Zinc-Air Battery Catalysts Production by Region (2027-2032) & (Tons)
Table 8. World Zinc-Air Battery Catalysts Production Market Share by Region (2021-2026)
Table 9. World Zinc-Air Battery Catalysts Production Market Share by Region (2027-2032)
Table 10. World Zinc-Air Battery Catalysts Average Price by Region (2021-2026) & (US$/kg)
Table 11. World Zinc-Air Battery Catalysts Average Price by Region (2027-2032) & (US$/kg)
Table 12. Zinc-Air Battery Catalysts Major Market Trends
Table 13. World Zinc-Air Battery Catalysts Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
Table 14. World Zinc-Air Battery Catalysts Consumption by Region (2021-2026) & (Tons)
Table 15. World Zinc-Air Battery Catalysts Consumption Forecast by Region (2027-2032) & (Tons)
Table 16. World Zinc-Air Battery Catalysts Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Zinc-Air Battery Catalysts Producers in 2025
Table 18. World Zinc-Air Battery Catalysts Production by Manufacturer (2021-2026) & (Tons)
Table 19. Production Market Share of Key Zinc-Air Battery Catalysts Producers in 2025
Table 20. World Zinc-Air Battery Catalysts Average Price by Manufacturer (2021-2026)

+357 96 030922
info@marketpublishers.com

& (US$/kg)
Table 21. Global Zinc-Air Battery Catalysts Company Evaluation Quadrant
Table 22. World Zinc-Air Battery Catalysts Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Zinc-Air Battery Catalysts Production Site of Key Manufacturer
Table 24. Zinc-Air Battery Catalysts Market: Company Product Type Footprint
Table 25. Zinc-Air Battery Catalysts Market: Company Product Application Footprint
Table 26. Zinc-Air Battery Catalysts Competitive Factors
Table 27. Zinc-Air Battery Catalysts New Entrant and Capacity Expansion Plans
Table 28. Zinc-Air Battery Catalysts Mergers & Acquisitions Activity
Table 29. United States VS China Zinc-Air Battery Catalysts Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Zinc-Air Battery Catalysts Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China Zinc-Air Battery Catalysts Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Zinc-Air Battery Catalysts Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Zinc-Air Battery Catalysts Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Zinc-Air Battery Catalysts Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers Zinc-Air Battery Catalysts Production Market Share (2021-2026)
Table 37. China Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Zinc-Air Battery Catalysts Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Zinc-Air Battery Catalysts Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Zinc-Air Battery Catalysts Production, (2021-2026) & (Tons)
Table 41. China Based Manufacturers Zinc-Air Battery Catalysts Production Market Share (2021-2026)
Table 42. Rest of World Based Zinc-Air Battery Catalysts Manufacturers, Headquarters and Production Site (State, Country)

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Table 43. Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production, (2021-2026) & (Tons)
Table 46. Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production Market Share (2021-2026)
Table 47. World Zinc-Air Battery Catalysts Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Zinc-Air Battery Catalysts Production by Type (2021-2026) & (Tons)
Table 49. World Zinc-Air Battery Catalysts Production by Type (2027-2032) & (Tons)
Table 50. World Zinc-Air Battery Catalysts Production Value by Type (2021-2026) & (USD Million)
Table 51. World Zinc-Air Battery Catalysts Production Value by Type (2027-2032) & (USD Million)
Table 52. World Zinc-Air Battery Catalysts Average Price by Type (2021-2026) & (US$/kg)
Table 53. World Zinc-Air Battery Catalysts Average Price by Type (2027-2032) & (US$/kg)
Table 54. World Zinc-Air Battery Catalysts Production Value by Primary Active Material, (USD Million), 2021 & 2025 & 2032
Table 55. World Zinc-Air Battery Catalysts Production by Primary Active Material (2021-2026) & (Tons)
Table 56. World Zinc-Air Battery Catalysts Production by Primary Active Material (2027-2032) & (Tons)
Table 57. World Zinc-Air Battery Catalysts Production Value by Primary Active Material (2021-2026) & (USD Million)
Table 58. World Zinc-Air Battery Catalysts Production Value by Primary Active Material (2027-2032) & (USD Million)
Table 59. World Zinc-Air Battery Catalysts Average Price by Primary Active Material (2021-2026) & (US$/kg)
Table 60. World Zinc-Air Battery Catalysts Average Price by Primary Active Material (2027-2032) & (US$/kg)
Table 61. World Zinc-Air Battery Catalysts Production Value by Product Form, (USD Million), 2021 & 2025 & 2032
Table 62. World Zinc-Air Battery Catalysts Production by Product Form (2021-2026) & (Tons)
Table 63. World Zinc-Air Battery Catalysts Production by Product Form (2027-2032) &

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(Tons)
Table 64. World Zinc-Air Battery Catalysts Production Value by Product Form (2021-2026) & (USD Million)
Table 65. World Zinc-Air Battery Catalysts Production Value by Product Form (2027-2032) & (USD Million)
Table 66. World Zinc-Air Battery Catalysts Average Price by Product Form (2021-2026) & (US$/kg)
Table 67. World Zinc-Air Battery Catalysts Average Price by Product Form (2027-2032) & (US$/kg)
Table 68. World Zinc-Air Battery Catalysts Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Zinc-Air Battery Catalysts Production by Application (2021-2026) & (Tons)
Table 70. World Zinc-Air Battery Catalysts Production by Application (2027-2032) & (Tons)
Table 71. World Zinc-Air Battery Catalysts Production Value by Application (2021-2026) & (USD Million)
Table 72. World Zinc-Air Battery Catalysts Production Value by Application (2027-2032) & (USD Million)
Table 73. World Zinc-Air Battery Catalysts Average Price by Application (2021-2026) & (US$/kg)
Table 74. World Zinc-Air Battery Catalysts Average Price by Application (2027-2032) & (US$/kg)
Table 75. Nexceris, LLC Basic Information, Manufacturing Base and Competitors
Table 76. Nexceris, LLC Major Business
Table 77. Nexceris, LLC Zinc-Air Battery Catalysts Product and Services
Table 78. Nexceris, LLC Zinc-Air Battery Catalysts Production (Tons), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Nexceris, LLC Recent Developments/Updates
Table 80. Nexceris, LLC Competitive Strengths & Weaknesses
Table 81. Hunan Yuanda New Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 82. Hunan Yuanda New Materials Co., Ltd. Major Business
Table 83. Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Product and Services
Table 84. Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Production (Tons), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Hunan Yuanda New Materials Co., Ltd. Recent Developments/Updates

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Table 86. Hunan Yuanda New Materials Co., Ltd. Competitive Strengths & Weaknesses
Table 87. AZUL Energy Inc. Basic Information, Manufacturing Base and Competitors
Table 88. AZUL Energy Inc. Major Business
Table 89. AZUL Energy Inc. Zinc-Air Battery Catalysts Product and Services
Table 90. AZUL Energy Inc. Zinc-Air Battery Catalysts Production (Tons), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. AZUL Energy Inc. Recent Developments/Updates
Table 92. AZUL Energy Inc. Competitive Strengths & Weaknesses
Table 93. Cerpotech AS Basic Information, Manufacturing Base and Competitors
Table 94. Cerpotech AS Major Business
Table 95. Cerpotech AS Zinc-Air Battery Catalysts Product and Services
Table 96. Cerpotech AS Zinc-Air Battery Catalysts Production (Tons), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Cerpotech AS Recent Developments/Updates
Table 98. Cerpotech AS Competitive Strengths & Weaknesses
Table 99. Global Key Players of Zinc-Air Battery Catalysts Upstream (Raw Materials)
Table 100. Global Zinc-Air Battery Catalysts Typical Customers
Table 101. Zinc-Air Battery Catalysts Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Zinc-Air Battery Catalysts Picture
Figure 2. World Zinc-Air Battery Catalysts Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Zinc-Air Battery Catalysts Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Zinc-Air Battery Catalysts Production (2021-2032) & (Tons)
Figure 5. World Zinc-Air Battery Catalysts Average Price (2021-2032) & (US$/kg)
Figure 6. World Zinc-Air Battery Catalysts Production Value Market Share by Region (2021-2032)
Figure 7. World Zinc-Air Battery Catalysts Production Market Share by Region (2021-2032)
Figure 8. North America Zinc-Air Battery Catalysts Production (2021-2032) & (Tons)
Figure 9. Europe Zinc-Air Battery Catalysts Production (2021-2032) & (Tons)
Figure 10. China Zinc-Air Battery Catalysts Production (2021-2032) & (Tons)
Figure 11. Japan Zinc-Air Battery Catalysts Production (2021-2032) & (Tons)
Figure 12. Zinc-Air Battery Catalysts Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 15. World Zinc-Air Battery Catalysts Consumption Market Share by Region (2021-2032)
Figure 16. United States Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 17. China Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 18. Europe Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 19. Japan Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 20. South Korea Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 21. ASEAN Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 22. India Zinc-Air Battery Catalysts Consumption (2021-2032) & (Tons)
Figure 23. Producer Shipments of Zinc-Air Battery Catalysts by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Zinc-Air Battery Catalysts Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Zinc-Air Battery Catalysts Markets in 2025
Figure 26. United States VS China: Zinc-Air Battery Catalysts Production Value Market Share Comparison (2021 & 2025 & 2032)

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Figure 27. United States VS China: Zinc-Air Battery Catalysts Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Zinc-Air Battery Catalysts Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Zinc-Air Battery Catalysts Production Market Share 2025
Figure 30. China Based Manufacturers Zinc-Air Battery Catalysts Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Zinc-Air Battery Catalysts Production Market Share 2025
Figure 32. World Zinc-Air Battery Catalysts Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Zinc-Air Battery Catalysts Production Value Market Share by Type in 2025
Figure 34. ORR Catalysts
Figure 35. OER Catalysts
Figure 36. Bifunctional ORR/OER Catalysts
Figure 37. Others
Figure 38. World Zinc-Air Battery Catalysts Production Market Share by Type (2021-2032)
Figure 39. World Zinc-Air Battery Catalysts Production Value Market Share by Type (2021-2032)
Figure 40. World Zinc-Air Battery Catalysts Average Price by Type (2021-2032) & (US$/kg)
Figure 41. World Zinc-Air Battery Catalysts Production Value by Primary Active Material, (USD Million), 2021 & 2025 & 2032
Figure 42. World Zinc-Air Battery Catalysts Production Value Market Share by Primary Active Material in 2025
Figure 43. Manganese Based Catalysts
Figure 44. Silver Based Catalysts
Figure 45. Platinum Group Metal Based Catalysts
Figure 46. Metal Nitrogen Carbon Catalysts
Figure 47. Other Non Precious Transition Metal Based Catalysts
Figure 48. Metal Free Carbon Catalysts
Figure 49. Others
Figure 50. Others
Figure 51. World Zinc-Air Battery Catalysts Production Market Share by Primary Active Material (2021-2032)
Figure 52. World Zinc-Air Battery Catalysts Production Value Market Share by Primary

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Active Material (2021-2032)
Figure 53. World Zinc-Air Battery Catalysts Average Price by Primary Active Material (2021-2032) & (US$/kg)
Figure 54. World Zinc-Air Battery Catalysts Production Value by Product Form, (USD Million), 2021 & 2025 & 2032
Figure 55. World Zinc-Air Battery Catalysts Production Value Market Share by Product Form in 2025
Figure 56. Dry Catalyst Powders
Figure 57. Catalyst Dispersions and Inks
Figure 58. Catalyst Pastes and Slurries
Figure 59. Others
Figure 60. World Zinc-Air Battery Catalysts Production Market Share by Product Form (2021-2032)
Figure 61. World Zinc-Air Battery Catalysts Production Value Market Share by Product Form (2021-2032)
Figure 62. World Zinc-Air Battery Catalysts Average Price by Product Form (2021-2032) & (US$/kg)
Figure 63. World Zinc-Air Battery Catalysts Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 64. World Zinc-Air Battery Catalysts Production Value Market Share by Application in 2025
Figure 65. Hearing Aids and Medical Devices
Figure 66. Consumer and Specialty Electronics
Figure 67. Stationary Energy Storage
Figure 68. Backup Power and Telecom
Figure 69. Research and Demonstration
Figure 70. Others
Figure 71. World Zinc-Air Battery Catalysts Production Market Share by Application (2021-2032)
Figure 72. World Zinc-Air Battery Catalysts Production Value Market Share by Application (2021-2032)
Figure 73. World Zinc-Air Battery Catalysts Average Price by Application (2021-2032) & (US$/kg)
Figure 74. Zinc-Air Battery Catalysts Industry Chain
Figure 75. Zinc-Air Battery Catalysts Procurement Model
Figure 76. Zinc-Air Battery Catalysts Sales Model
Figure 77. Zinc-Air Battery Catalysts Sales Channels, Direct Sales, and Distribution
Figure 78. Methodology
Figure 79. Research Process and Data Source

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