

# Global Zirconia Toughened Mullite Ceramics Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Zirconia Toughened Mullite Ceramics market size is expected to reach \$ 1487 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

In 2025, global Zirconia Toughened Mullite Ceramics production reached approximately 30k units, with an average global market price of around US\$30k per unit.

Zirconia Toughened Mullite (ZTM) is a multiphase ceramic material in which a mullite ( $\text{Al}_2\text{O}_3\text{-SiO}_2$ ) matrix is reinforced by dispersed zirconia particles, typically tetragonal  $\text{ZrO}_2$ . The key mechanism is transformation toughening, where stress-induced phase transformation of zirconia inhibits crack propagation, significantly improving the inherent brittleness of mullite. As a result, ZTM combines high-temperature stability, excellent thermal shock resistance, and enhanced strength and fracture toughness, making it suitable for high-temperature structural components, wear parts, engine components, and refractory linings.

The upstream of the ZTM ceramic industry includes alumina, silica sources (such as kaolin and silica sand), zirconia powders, stabilizers (e.g.,  $\text{Y}_2\text{O}_3$ ,  $\text{CeO}_2$ ), and processing equipment suppliers. The midstream consists of advanced ceramic and refractory manufacturers responsible for powder formulation, shaping (isostatic pressing, slip casting, gelcasting), and high-temperature sintering. Downstream applications are concentrated in metallurgical industries (steel, glass furnaces), energy equipment (gas turbines, diesel engine components), wear-resistant machinery parts, and high-temperature chemical equipment. Representative upstream players include Tosoh, Saint-Gobain, and Imerys, while downstream users include Siemens Energy, GE, and major metallurgical companies. The industry is characterized by material-

driven upstream, process-intensive midstream, and high-temperature application-driven demand.

This report studies the global Zirconia Toughened Mullite Ceramics production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Zirconia Toughened Mullite Ceramics 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 Zirconia Toughened Mullite Ceramics that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Zirconia Toughened Mullite Ceramics total production and demand, 2021-2032, (Kilotons)

Global Zirconia Toughened Mullite Ceramics total production value, 2021-2032, (USD Million)

Global Zirconia Toughened Mullite Ceramics production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Zirconia Toughened Mullite Ceramics consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Zirconia Toughened Mullite Ceramics domestic production, consumption, key domestic manufacturers and share

Global Zirconia Toughened Mullite Ceramics production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Zirconia Toughened Mullite Ceramics production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Zirconia Toughened Mullite Ceramics production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Zirconia Toughened Mullite Ceramics 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 Maruwa, ZirPro, Du-Co Ceramics, Final Advanced Materials, CoorsTek, Nishimura, Mindrum Precision, Morgan Advanced Materials, Mingrui Ceramic, Hard Precision Ceramic, 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 Zirconia Toughened Mullite Ceramics 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 Zirconia Toughened Mullite Ceramics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Zirconia Toughened Mullite Ceramics Market, Segmentation by Type:

ZTM/Al<sub>2</sub>O<sub>3</sub>

ZTM/SiC

Others

## Global Zirconia Toughened Mullite Ceramics Market, Segmentation by Sintering Process:

Hot Pressing Sintering

Atmospheric Pressure Sintering

## Global Zirconia Toughened Mullite Ceramics Market, Segmentation by Application:

Automotive

Aerospace

Electronics

Others

## Companies Profiled:

Maruwa

ZirPro

Du-Co Ceramics

Final Advanced Materials

CoorsTek

Nishimura

Mindrum Precision

Morgan Advanced Materials

Mingrui Ceramic

Hard Precision Ceramic

Jinggang Ceramic Technology

**Key Questions Answered:**

1. How big is the global Zirconia Toughened Mullite Ceramics market?
2. What is the demand of the global Zirconia Toughened Mullite Ceramics market?
3. What is the year over year growth of the global Zirconia Toughened Mullite Ceramics market?
4. What is the production and production value of the global Zirconia Toughened Mullite Ceramics market?
5. Who are the key producers in the global Zirconia Toughened Mullite Ceramics market?
6. What are the growth factors driving the market demand?

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