

Global Zinc-Air Battery Catalysts Market Growth 2026-2032

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Abstracts

The global Zinc-Air Battery Catalysts market size is predicted to grow from US\$ 8.61 million in 2025 to US\$ 18.60 million in 2032; it is expected to grow at a CAGR of 11.5% from 2026 to 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 FindingsThe global weighted average selling price of zinc-air battery catalysts was approximately US\$35–50/kg in 2025. 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.

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.

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 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.

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.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Zinc-Air Battery Catalysts Industry Forecast" looks at past sales and reviews total world Zinc-Air Battery Catalysts sales in 2025, providing a comprehensive analysis by region and market sector of projected Zinc-Air Battery Catalysts sales for 2026 through 2032. With Zinc-Air Battery Catalysts sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Zinc-Air Battery Catalysts industry.

This Insight Report provides a comprehensive analysis of the global Zinc-Air Battery Catalysts landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Zinc-Air Battery Catalysts portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Zinc-Air Battery Catalysts market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Zinc-Air Battery Catalysts and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of

opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Zinc-Air Battery Catalysts.

This report presents a comprehensive overview, market shares, and growth opportunities of Zinc-Air Battery Catalysts market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

ORR Catalysts

OER Catalysts

Bifunctional ORR/OER Catalysts

Others

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

Segmentation by Product Form:

Dry Catalyst Powders

Catalyst Dispersions and Inks

Catalyst Pastes and Slurries

Others

Segmentation by Application:

Hearing Aids and Medical Devices

Consumer and Specialty Electronics

Stationary Energy Storage

Backup Power and Telecom

Research and Demonstration

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Nexceris, LLC

Hunan Yuanda New Materials Co., Ltd.

AZUL Energy Inc.

Cerpotech AS

Key Questions Addressed in this Report

What is the 10-year outlook for the global Zinc-Air Battery Catalysts market?

What factors are driving Zinc-Air Battery Catalysts market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Zinc-Air Battery Catalysts market opportunities vary by end market size?

How does Zinc-Air Battery Catalysts break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Zinc-Air Battery Catalysts Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Zinc-Air Battery Catalysts by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Zinc-Air Battery Catalysts by Country/Region, 2021, 2025 & 2032
- 2.2 Zinc-Air Battery Catalysts Segment by Type
 - 2.2.1 ORR Catalysts
 - 2.2.2 OER Catalysts
 - 2.2.3 Bifunctional ORR/OER Catalysts
 - 2.2.4 Others
 - 2.2.5 Zinc-Air Battery Catalysts Sales by Type
 - 2.2.5.1 Global Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Zinc-Air Battery Catalysts Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Zinc-Air Battery Catalysts Sale Price by Type (2021-2026)
- 2.3 Zinc-Air Battery Catalysts Segment by Primary Active Material
 - 2.3.1 Manganese Based Catalysts
 - 2.3.2 Silver Based Catalysts
 - 2.3.3 Platinum Group Metal Based Catalysts
 - 2.3.4 Metal Nitrogen Carbon Catalysts
 - 2.3.5 Other Non Precious Transition Metal Based Catalysts
 - 2.3.6 Metal Free Carbon Catalysts
 - 2.3.7 Others

2.3.8 Zinc-Air Battery Catalysts Sales by Primary Active Material

2.3.8.1 Global Zinc-Air Battery Catalysts Sales Market Share by Primary Active Material (2021-2026)

2.3.8.2 Global Zinc-Air Battery Catalysts Revenue and Market Share by Primary Active Material (2021-2026)

2.3.8.3 Global Zinc-Air Battery Catalysts Sale Price by Primary Active Material (2021-2026)

2.4 Zinc-Air Battery Catalysts Segment by Product Form

2.4.1 Dry Catalyst Powders

2.4.2 Catalyst Dispersions and Inks

2.4.3 Catalyst Pastes and Slurries

2.4.4 Others

2.4.5 Zinc-Air Battery Catalysts Sales by Product Form

2.4.5.1 Global Zinc-Air Battery Catalysts Sales Market Share by Product Form (2021-2026)

2.4.5.2 Global Zinc-Air Battery Catalysts Revenue and Market Share by Product Form (2021-2026)

2.4.5.3 Global Zinc-Air Battery Catalysts Sale Price by Product Form (2021-2026)

2.5 Zinc-Air Battery Catalysts Segment by Application

2.5.1 Hearing Aids and Medical Devices

2.5.2 Consumer and Specialty Electronics

2.5.3 Stationary Energy Storage

2.5.4 Backup Power and Telecom

2.5.5 Research and Demonstration

2.5.6 Others

2.5.7 Zinc-Air Battery Catalysts Sales by Application

2.5.7.1 Global Zinc-Air Battery Catalysts Sale Market Share by Application (2021-2026)

2.5.7.2 Global Zinc-Air Battery Catalysts Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Zinc-Air Battery Catalysts Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Zinc-Air Battery Catalysts Breakdown Data by Company

3.1.1 Global Zinc-Air Battery Catalysts Annual Sales by Company (2021-2026)

3.1.2 Global Zinc-Air Battery Catalysts Sales Market Share by Company (2021-2026)

3.2 Global Zinc-Air Battery Catalysts Annual Revenue by Company (2021-2026)

3.2.1 Global Zinc-Air Battery Catalysts Revenue by Company (2021-2026)

- 3.2.2 Global Zinc-Air Battery Catalysts Revenue Market Share by Company (2021-2026)
- 3.3 Global Zinc-Air Battery Catalysts Sale Price by Company
- 3.4 Key Manufacturers Zinc-Air Battery Catalysts Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Zinc-Air Battery Catalysts Product Location Distribution
 - 3.4.2 Players Zinc-Air Battery Catalysts Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ZINC-AIR BATTERY CATALYSTS BY GEOGRAPHIC REGION

- 4.1 World Historic Zinc-Air Battery Catalysts Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Zinc-Air Battery Catalysts Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Zinc-Air Battery Catalysts Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Zinc-Air Battery Catalysts Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Zinc-Air Battery Catalysts Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Zinc-Air Battery Catalysts Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Zinc-Air Battery Catalysts Sales Growth
- 4.4 APAC Zinc-Air Battery Catalysts Sales Growth
- 4.5 Europe Zinc-Air Battery Catalysts Sales Growth
- 4.6 Middle East & Africa Zinc-Air Battery Catalysts Sales Growth

5 AMERICAS

- 5.1 Americas Zinc-Air Battery Catalysts Sales by Country
 - 5.1.1 Americas Zinc-Air Battery Catalysts Sales by Country (2021-2026)
 - 5.1.2 Americas Zinc-Air Battery Catalysts Revenue by Country (2021-2026)
- 5.2 Americas Zinc-Air Battery Catalysts Sales by Type (2021-2026)
- 5.3 Americas Zinc-Air Battery Catalysts Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Zinc-Air Battery Catalysts Sales by Region

6.1.1 APAC Zinc-Air Battery Catalysts Sales by Region (2021-2026)

6.1.2 APAC Zinc-Air Battery Catalysts Revenue by Region (2021-2026)

6.2 APAC Zinc-Air Battery Catalysts Sales by Type (2021-2026)

6.3 APAC Zinc-Air Battery Catalysts Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Zinc-Air Battery Catalysts by Country

7.1.1 Europe Zinc-Air Battery Catalysts Sales by Country (2021-2026)

7.1.2 Europe Zinc-Air Battery Catalysts Revenue by Country (2021-2026)

7.2 Europe Zinc-Air Battery Catalysts Sales by Type (2021-2026)

7.3 Europe Zinc-Air Battery Catalysts Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Zinc-Air Battery Catalysts by Country

8.1.1 Middle East & Africa Zinc-Air Battery Catalysts Sales by Country (2021-2026)

8.1.2 Middle East & Africa Zinc-Air Battery Catalysts Revenue by Country (2021-2026)

8.2 Middle East & Africa Zinc-Air Battery Catalysts Sales by Type (2021-2026)

8.3 Middle East & Africa Zinc-Air Battery Catalysts Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Zinc-Air Battery Catalysts

10.3 Manufacturing Process Analysis of Zinc-Air Battery Catalysts

10.4 Industry Chain Structure of Zinc-Air Battery Catalysts

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Zinc-Air Battery Catalysts Distributors

11.3 Zinc-Air Battery Catalysts Customer

12 WORLD FORECAST REVIEW FOR ZINC-AIR BATTERY CATALYSTS BY GEOGRAPHIC REGION

12.1 Global Zinc-Air Battery Catalysts Market Size Forecast by Region

12.1.1 Global Zinc-Air Battery Catalysts Forecast by Region (2027-2032)

12.1.2 Global Zinc-Air Battery Catalysts Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Zinc-Air Battery Catalysts Forecast by Type (2027-2032)

12.7 Global Zinc-Air Battery Catalysts Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Nexceris, LLC

13.1.1 Nexceris, LLC Company Information

13.1.2 Nexceris, LLC Zinc-Air Battery Catalysts Product Portfolios and Specifications

13.1.3 Nexceris, LLC Zinc-Air Battery Catalysts Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Nexceris, LLC Main Business Overview

13.1.5 Nexceris, LLC Latest Developments

13.2 Hunan Yuanda New Materials Co., Ltd.

13.2.1 Hunan Yuanda New Materials Co., Ltd. Company Information

13.2.2 Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Product Portfolios and Specifications

13.2.3 Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Hunan Yuanda New Materials Co., Ltd. Main Business Overview

13.2.5 Hunan Yuanda New Materials Co., Ltd. Latest Developments

13.3 AZUL Energy Inc.

13.3.1 AZUL Energy Inc. Company Information

13.3.2 AZUL Energy Inc. Zinc-Air Battery Catalysts Product Portfolios and Specifications

13.3.3 AZUL Energy Inc. Zinc-Air Battery Catalysts Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 AZUL Energy Inc. Main Business Overview

13.3.5 AZUL Energy Inc. Latest Developments

13.4 Cerpotech AS

13.4.1 Cerpotech AS Company Information

13.4.2 Cerpotech AS Zinc-Air Battery Catalysts Product Portfolios and Specifications

13.4.3 Cerpotech AS Zinc-Air Battery Catalysts Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Cerpotech AS Main Business Overview

13.4.5 Cerpotech AS Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Zinc-Air Battery Catalysts Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Zinc-Air Battery Catalysts Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of ORR Catalysts

Table 4. Major Players of OER Catalysts

Table 5. Major Players of Bifunctional ORR/OER Catalysts

Table 6. Major Players of Others

Table 7. Global Zinc-Air Battery Catalysts Sales by Type (2021-2026) & (Tons)

Table 8. Global Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)

Table 9. Global Zinc-Air Battery Catalysts Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Zinc-Air Battery Catalysts Revenue Market Share by Type (2021-2026)

Table 11. Global Zinc-Air Battery Catalysts Sale Price by Type (2021-2026) & (US\$/kg)

Table 12. Major Players of Manganese Based Catalysts

Table 13. Major Players of Silver Based Catalysts

Table 14. Major Players of Platinum Group Metal Based Catalysts

Table 15. Major Players of Metal Nitrogen Carbon Catalysts

Table 16. Major Players of Other Non Precious Transition Metal Based Catalysts

Table 17. Major Players of Metal Free Carbon Catalysts

Table 18. Major Players of Others

Table 19. Global Zinc-Air Battery Catalysts Sales by Primary Active Material (2021-2026) & (Tons)

Table 20. Global Zinc-Air Battery Catalysts Sales Market Share by Primary Active Material (2021-2026)

Table 21. Global Zinc-Air Battery Catalysts Revenue by Primary Active Material (2021-2026) & (\$ million)

Table 22. Global Zinc-Air Battery Catalysts Revenue Market Share by Primary Active Material (2021-2026)

Table 23. Global Zinc-Air Battery Catalysts Sale Price by Primary Active Material (2021-2026) & (US\$/kg)

Table 24. Major Players of Dry Catalyst Powders

Table 25. Major Players of Catalyst Dispersions and Inks

Table 26. Major Players of Catalyst Pastes and Slurries

Table 27. Major Players of Others

Table 28. Global Zinc-Air Battery Catalysts Sales by Product Form (2021-2026) & (Tons)

Table 29. Global Zinc-Air Battery Catalysts Sales Market Share by Product Form (2021-2026)

Table 30. Global Zinc-Air Battery Catalysts Revenue by Product Form (2021-2026) & (\$ million)

Table 31. Global Zinc-Air Battery Catalysts Revenue Market Share by Product Form (2021-2026)

Table 32. Global Zinc-Air Battery Catalysts Sale Price by Product Form (2021-2026) & (US\$/kg)

Table 33. Global Zinc-Air Battery Catalysts Sale by Application (2021-2026) & (Tons)

Table 34. Global Zinc-Air Battery Catalysts Sale Market Share by Application (2021-2026)

Table 35. Global Zinc-Air Battery Catalysts Revenue by Application (2021-2026) & (\$ million)

Table 36. Global Zinc-Air Battery Catalysts Revenue Market Share by Application (2021-2026)

Table 37. Global Zinc-Air Battery Catalysts Sale Price by Application (2021-2026) & (US\$/kg)

Table 38. Global Zinc-Air Battery Catalysts Sales by Company (2021-2026) & (Tons)

Table 39. Global Zinc-Air Battery Catalysts Sales Market Share by Company (2021-2026)

Table 40. Global Zinc-Air Battery Catalysts Revenue by Company (2021-2026) & (\$ millions)

Table 41. Global Zinc-Air Battery Catalysts Revenue Market Share by Company (2021-2026)

Table 42. Global Zinc-Air Battery Catalysts Sale Price by Company (2021-2026) & (US\$/kg)

Table 43. Key Manufacturers Zinc-Air Battery Catalysts Producing Area Distribution and Sales Area

Table 44. Players Zinc-Air Battery Catalysts Products Offered

Table 45. Zinc-Air Battery Catalysts Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 46. New Products and Potential Entrants

Table 47. Market M&A Activity & Strategy

Table 48. Global Zinc-Air Battery Catalysts Sales by Geographic Region (2021-2026) & (Tons)

Table 49. Global Zinc-Air Battery Catalysts Sales Market Share Geographic Region (2021-2026)

Table 50. Global Zinc-Air Battery Catalysts Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 51. Global Zinc-Air Battery Catalysts Revenue Market Share by Geographic Region (2021-2026)

Table 52. Global Zinc-Air Battery Catalysts Sales by Country/Region (2021-2026) & (Tons)

Table 53. Global Zinc-Air Battery Catalysts Sales Market Share by Country/Region (2021-2026)

Table 54. Global Zinc-Air Battery Catalysts Revenue by Country/Region (2021-2026) & (\$ millions)

Table 55. Global Zinc-Air Battery Catalysts Revenue Market Share by Country/Region (2021-2026)

Table 56. Americas Zinc-Air Battery Catalysts Sales by Country (2021-2026) & (Tons)

Table 57. Americas Zinc-Air Battery Catalysts Sales Market Share by Country (2021-2026)

Table 58. Americas Zinc-Air Battery Catalysts Revenue by Country (2021-2026) & (\$ millions)

Table 59. Americas Zinc-Air Battery Catalysts Sales by Type (2021-2026) & (Tons)

Table 60. Americas Zinc-Air Battery Catalysts Sales by Application (2021-2026) & (Tons)

Table 61. APAC Zinc-Air Battery Catalysts Sales by Region (2021-2026) & (Tons)

Table 62. APAC Zinc-Air Battery Catalysts Sales Market Share by Region (2021-2026)

Table 63. APAC Zinc-Air Battery Catalysts Revenue by Region (2021-2026) & (\$ millions)

Table 64. APAC Zinc-Air Battery Catalysts Sales by Type (2021-2026) & (Tons)

Table 65. APAC Zinc-Air Battery Catalysts Sales by Application (2021-2026) & (Tons)

Table 66. Europe Zinc-Air Battery Catalysts Sales by Country (2021-2026) & (Tons)

Table 67. Europe Zinc-Air Battery Catalysts Revenue by Country (2021-2026) & (\$ millions)

Table 68. Europe Zinc-Air Battery Catalysts Sales by Type (2021-2026) & (Tons)

Table 69. Europe Zinc-Air Battery Catalysts Sales by Application (2021-2026) & (Tons)

Table 70. Middle East & Africa Zinc-Air Battery Catalysts Sales by Country (2021-2026) & (Tons)

Table 71. Middle East & Africa Zinc-Air Battery Catalysts Revenue Market Share by Country (2021-2026)

Table 72. Middle East & Africa Zinc-Air Battery Catalysts Sales by Type (2021-2026) & (Tons)

Table 73. Middle East & Africa Zinc-Air Battery Catalysts Sales by Application (2021-2026) & (Tons)

Table 74. Key Market Drivers & Growth Opportunities of Zinc-Air Battery Catalysts

Table 75. Key Market Challenges & Risks of Zinc-Air Battery Catalysts

Table 76. Key Industry Trends of Zinc-Air Battery Catalysts

Table 77. Zinc-Air Battery Catalysts Raw Material

Table 78. Key Suppliers of Raw Materials

Table 79. Zinc-Air Battery Catalysts Distributors List

Table 80. Zinc-Air Battery Catalysts Customer List

Table 81. Global Zinc-Air Battery Catalysts Sales Forecast by Region (2027-2032) & (Tons)

Table 82. Global Zinc-Air Battery Catalysts Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Americas Zinc-Air Battery Catalysts Sales Forecast by Country (2027-2032) & (Tons)

Table 84. Americas Zinc-Air Battery Catalysts Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. APAC Zinc-Air Battery Catalysts Sales Forecast by Region (2027-2032) & (Tons)

Table 86. APAC Zinc-Air Battery Catalysts Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 87. Europe Zinc-Air Battery Catalysts Sales Forecast by Country (2027-2032) & (Tons)

Table 88. Europe Zinc-Air Battery Catalysts Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Middle East & Africa Zinc-Air Battery Catalysts Sales Forecast by Country (2027-2032) & (Tons)

Table 90. Middle East & Africa Zinc-Air Battery Catalysts Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. Global Zinc-Air Battery Catalysts Sales Forecast by Type (2027-2032) & (Tons)

Table 92. Global Zinc-Air Battery Catalysts Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 93. Global Zinc-Air Battery Catalysts Sales Forecast by Application (2027-2032) & (Tons)

Table 94. Global Zinc-Air Battery Catalysts Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 95. Nexceris, LLC Basic Information, Zinc-Air Battery Catalysts Manufacturing Base, Sales Area and Its Competitors

Table 96. Nexceris, LLC Zinc-Air Battery Catalysts Product Portfolios and Specifications

Table 97. Nexceris, LLC Zinc-Air Battery Catalysts Sales (Tons), Revenue (\$ Million),

Price (US\$/kg) and Gross Margin (2021-2026)

Table 98. Nexceris, LLC Main Business

Table 99. Nexceris, LLC Latest Developments

Table 100. Hunan Yuanda New Materials Co., Ltd. Basic Information, Zinc-Air Battery Catalysts Manufacturing Base, Sales Area and Its Competitors

Table 101. Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Product Portfolios and Specifications

Table 102. Hunan Yuanda New Materials Co., Ltd. Zinc-Air Battery Catalysts Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 103. Hunan Yuanda New Materials Co., Ltd. Main Business

Table 104. Hunan Yuanda New Materials Co., Ltd. Latest Developments

Table 105. AZUL Energy Inc. Basic Information, Zinc-Air Battery Catalysts Manufacturing Base, Sales Area and Its Competitors

Table 106. AZUL Energy Inc. Zinc-Air Battery Catalysts Product Portfolios and Specifications

Table 107. AZUL Energy Inc. Zinc-Air Battery Catalysts Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 108. AZUL Energy Inc. Main Business

Table 109. AZUL Energy Inc. Latest Developments

Table 110. Cerpotech AS Basic Information, Zinc-Air Battery Catalysts Manufacturing Base, Sales Area and Its Competitors

Table 111. Cerpotech AS Zinc-Air Battery Catalysts Product Portfolios and Specifications

Table 112. Cerpotech AS Zinc-Air Battery Catalysts Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 113. Cerpotech AS Main Business

Table 114. Cerpotech AS Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Zinc-Air Battery Catalysts
- Figure 2. Zinc-Air Battery Catalysts Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Zinc-Air Battery Catalysts Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Zinc-Air Battery Catalysts Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Zinc-Air Battery Catalysts Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Zinc-Air Battery Catalysts Sales Market Share by Country/Region (2025)
- Figure 10. Zinc-Air Battery Catalysts Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of ORR Catalysts
- Figure 12. Product Picture of OER Catalysts
- Figure 13. Product Picture of Bifunctional ORR/OER Catalysts
- Figure 14. Product Picture of Others
- Figure 15. Global Zinc-Air Battery Catalysts Sales Market Share by Type in 2026
- Figure 16. Global Zinc-Air Battery Catalysts Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Manganese Based Catalysts
- Figure 18. Product Picture of Silver Based Catalysts
- Figure 19. Product Picture of Platinum Group Metal Based Catalysts
- Figure 20. Product Picture of Metal Nitrogen Carbon Catalysts
- Figure 21. Product Picture of Other Non Precious Transition Metal Based Catalysts
- Figure 22. Product Picture of Metal Free Carbon Catalysts
- Figure 23. Product Picture of Others
- Figure 24. Global Zinc-Air Battery Catalysts Sales Market Share by Primary Active Material in 2026
- Figure 25. Global Zinc-Air Battery Catalysts Revenue Market Share by Primary Active Material (2021-2026)
- Figure 26. Product Picture of Dry Catalyst Powders
- Figure 27. Product Picture of Catalyst Dispersions and Inks
- Figure 28. Product Picture of Catalyst Pastes and Slurries
- Figure 29. Product Picture of Others

Figure 30. Global Zinc-Air Battery Catalysts Sales Market Share by Product Form in 2026

Figure 31. Global Zinc-Air Battery Catalysts Revenue Market Share by Product Form (2021-2026)

Figure 32. Zinc-Air Battery Catalysts Consumed in Hearing Aids and Medical Devices

Figure 33. Global Zinc-Air Battery Catalysts Market: Hearing Aids and Medical Devices (2021-2026) & (Tons)

Figure 34. Zinc-Air Battery Catalysts Consumed in Consumer and Specialty Electronics

Figure 35. Global Zinc-Air Battery Catalysts Market: Consumer and Specialty Electronics (2021-2026) & (Tons)

Figure 36. Zinc-Air Battery Catalysts Consumed in Stationary Energy Storage

Figure 37. Global Zinc-Air Battery Catalysts Market: Stationary Energy Storage (2021-2026) & (Tons)

Figure 38. Zinc-Air Battery Catalysts Consumed in Backup Power and Telecom

Figure 39. Global Zinc-Air Battery Catalysts Market: Backup Power and Telecom (2021-2026) & (Tons)

Figure 40. Zinc-Air Battery Catalysts Consumed in Research and Demonstration

Figure 41. Global Zinc-Air Battery Catalysts Market: Research and Demonstration (2021-2026) & (Tons)

Figure 42. Zinc-Air Battery Catalysts Consumed in Others

Figure 43. Global Zinc-Air Battery Catalysts Market: Others (2021-2026) & (Tons)

Figure 44. Global Zinc-Air Battery Catalysts Sale Market Share by Application (2025)

Figure 45. Global Zinc-Air Battery Catalysts Revenue Market Share by Application in 2025

Figure 46. Zinc-Air Battery Catalysts Sales by Company in 2025 (Tons)

Figure 47. Global Zinc-Air Battery Catalysts Sales Market Share by Company in 2025

Figure 48. Zinc-Air Battery Catalysts Revenue by Company in 2025 (\$ millions)

Figure 49. Global Zinc-Air Battery Catalysts Revenue Market Share by Company in 2025

Figure 50. Global Zinc-Air Battery Catalysts Sales Market Share by Geographic Region (2021-2026)

Figure 51. Global Zinc-Air Battery Catalysts Revenue Market Share by Geographic Region in 2025

Figure 52. Americas Zinc-Air Battery Catalysts Sales 2021-2026 (Tons)

Figure 53. Americas Zinc-Air Battery Catalysts Revenue 2021-2026 (\$ millions)

Figure 54. APAC Zinc-Air Battery Catalysts Sales 2021-2026 (Tons)

Figure 55. APAC Zinc-Air Battery Catalysts Revenue 2021-2026 (\$ millions)

Figure 56. Europe Zinc-Air Battery Catalysts Sales 2021-2026 (Tons)

Figure 57. Europe Zinc-Air Battery Catalysts Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Zinc-Air Battery Catalysts Sales 2021-2026 (Tons)

Figure 59. Middle East & Africa Zinc-Air Battery Catalysts Revenue 2021-2026 (\$ millions)

Figure 60. Americas Zinc-Air Battery Catalysts Sales Market Share by Country in 2025

Figure 61. Americas Zinc-Air Battery Catalysts Revenue Market Share by Country (2021-2026)

Figure 62. Americas Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)

Figure 63. Americas Zinc-Air Battery Catalysts Sales Market Share by Application (2021-2026)

Figure 64. United States Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 65. Canada Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 66. Mexico Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 67. Brazil Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 68. APAC Zinc-Air Battery Catalysts Sales Market Share by Region in 2025

Figure 69. APAC Zinc-Air Battery Catalysts Revenue Market Share by Region (2021-2026)

Figure 70. APAC Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)

Figure 71. APAC Zinc-Air Battery Catalysts Sales Market Share by Application (2021-2026)

Figure 72. China Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 73. Japan Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 74. South Korea Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 75. Southeast Asia Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 76. India Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 77. Australia Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 78. China Taiwan Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 79. Europe Zinc-Air Battery Catalysts Sales Market Share by Country in 2025

Figure 80. Europe Zinc-Air Battery Catalysts Revenue Market Share by Country (2021-2026)

Figure 81. Europe Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)

Figure 82. Europe Zinc-Air Battery Catalysts Sales Market Share by Application (2021-2026)

Figure 83. Germany Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 84. France Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 85. UK Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 86. Italy Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 87. Russia Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 88. Middle East & Africa Zinc-Air Battery Catalysts Sales Market Share by Country (2021-2026)

Figure 89. Middle East & Africa Zinc-Air Battery Catalysts Sales Market Share by Type (2021-2026)

Figure 90. Middle East & Africa Zinc-Air Battery Catalysts Sales Market Share by Application (2021-2026)

Figure 91. Egypt Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 92. South Africa Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 93. Israel Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 94. Turkey Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 95. GCC Countries Zinc-Air Battery Catalysts Revenue Growth 2021-2026 (\$ millions)

Figure 96. Manufacturing Cost Structure Analysis of Zinc-Air Battery Catalysts in 2026

Figure 97. Manufacturing Process Analysis of Zinc-Air Battery Catalysts

Figure 98. Industry Chain Structure of Zinc-Air Battery Catalysts

Figure 99. Channels of Distribution

Figure 100. Global Zinc-Air Battery Catalysts Sales Market Forecast by Region (2027-2032)

Figure 101. Global Zinc-Air Battery Catalysts Revenue Market Share Forecast by Region (2027-2032)

Figure 102. Global Zinc-Air Battery Catalysts Sales Market Share Forecast by Type (2027-2032)

Figure 103. Global Zinc-Air Battery Catalysts Revenue Market Share Forecast by Type (2027-2032)

Figure 104. Global Zinc-Air Battery Catalysts Sales Market Share Forecast by Application (2027-2032)

Figure 105. Global Zinc-Air Battery Catalysts Revenue Market Share Forecast by Application (2027-2032)

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