

Global Zirconium Oxychloride for Ceramics and Refractories Market Growth 2026-2032

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Abstracts

The global Zirconium Oxychloride for Ceramics and Refractories market size is predicted to grow from US\$ 136 million in 2025 to US\$ 194 million in 2032; it is expected to grow at a CAGR of 5.0% from 2026 to 2032.

In 2025, global production of zirconium oxychloride for ceramics and refractories reached 71,000 metric tons, with an average price of \$1,966 per ton.

Zirconium oxychloride ($\text{ZrOCl}_2 \cdot 8\text{H}_2\text{O}$)—also known as zirconium dichloride oxide—used in ceramics and refractories refers to products with purity levels meeting the application requirements of traditional industrial sectors such as ceramic glazes, structural ceramics, and refractory materials. It serves as a fundamental intermediate raw material in the zirconium chemical industry chain. Through calcination, it can be converted into industrial-grade zirconium dioxide (zirconia), which is subsequently used to whiten and harden ceramic glazes, ensure high-temperature stability in refractories, and toughen structural ceramics. In the ceramics industry, it is primarily used to produce zirconia-based ceramic materials; when added to glazes, it improves surface hardness and gloss while enhancing chemical stability. In the refractory sector, it is a key raw material for producing support plates for electronic ceramics, as well as refractory materials used in molten glass and metallurgical applications.

The raw material system for this product centers on zircon sand (ZrSiO_4), supplemented by chemical agents such as caustic soda (NaOH) and hydrochloric acid (HCl). Zircon sand is the sole mineral source of zirconium; global resources are highly concentrated in Australia and South Africa, and China relies heavily on imports, which account for over 90% of its supply. Producing one ton of zirconium oxychloride consumes approximately 0.6–0.7 tons of zircon sand, meaning fluctuations in sand

prices directly impact production costs—manufacturers typically raise product prices in tandem with increases in zircon sand costs. Caustic soda is the core auxiliary agent in the alkali fusion process used to decompose zircon sand, requiring a high-temperature reaction (600–800°C) with the sand. Hydrochloric acid is utilized in the acid leaching transformation and pickling stages. Additionally, some enterprises are exploring the recovery of associated elements—such as zirconium, scandium, and rare earths—from the crystallization mother liquor to improve the efficiency of comprehensive resource utilization. In terms of cost structure, raw material costs represent the largest expenditure for zirconium oxychloride used in ceramics and refractories, typically accounting for 50%–60% of total production costs. Zircon sand and caustic soda constitute the vast majority of these raw material costs, directly determining the product's cost floor. Energy costs account for approximately 15%–25%; the alkali fusion process requires high temperatures and consumes significant amounts of steam and electricity, while the concentration and crystallization stages also require substantial thermal energy to evaporate water. Environmental treatment costs make up about 10%–15%; the alkali fusion method generates roughly 0.5–0.7 tons of silicon slag and large volumes of alkaline wastewater per ton of zirconium oxychloride produced. Storing acidic silicon slag occupies land and pollutes the environment, and treating waste alkaline liquor is costly. Although process improvements can convert waste silicon slag into silica by-products for resource recovery, the initial investment required is substantial. Equipment depreciation and maintenance costs account for approximately 5%–10%; the equipment for the alkali fusion method is relatively simple (cast-iron pots, rotary kilns, reactors, filter presses, etc.), requiring less investment than the boiling chlorination method. Labor and management costs account for approximately 5%–10%.

United States market for Zirconium Oxychloride for Ceramics and Refractories is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Zirconium Oxychloride for Ceramics and Refractories is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Zirconium Oxychloride for Ceramics and Refractories is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Zirconium Oxychloride for Ceramics and Refractories players cover Changyu Holding Group, Jiangxi Jingan High Technology, Orient Zirconic Ind Sci &

Tech, Yixing Gaoyang Chemical, Shandong Hongyuan, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Zirconium Oxychloride for Ceramics and Refractories 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 Zirconium Oxychloride for Ceramics and Refractories portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Zirconium Oxychloride for Ceramics and Refractories market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Zirconium Oxychloride for Ceramics and Refractories 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 Zirconium Oxychloride for Ceramics and Refractories.

This report presents a comprehensive overview, market shares, and growth opportunities of Zirconium Oxychloride for Ceramics and Refractories market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

ZrO₂+HfO₂??36.0%

ZrO₂+HfO₂??35.0%–35.5%

Segmentation by Process:

One-acid, One-alkali Method

Two-acid, Two-alkali Method

Boiling Chlorination Method

Other

Segmentation by Product Form:

Crystals

Solution

Segmentation by Application:

Structural Ceramics

Functional Ceramics

Ceramic Cutting Tools

Ceramic Glazes

High-temperature Refractories

Other

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.

Changyu Holding Group

Jiangxi Jingan High Technology

Orient Zirconic Ind Sci & Tech

Yixing Gaoyang Chemical

Shandong Hongyuan

Anhui Kangda Zirconium Industry

Sanxiang Advanced Materials

IMERYS

Saint-Gobain

DKK Group

ATI Materials

Key Questions Addressed in this Report

What is the 10-year outlook for the global Zirconium Oxychloride for Ceramics

and Refractories market?

What factors are driving Zirconium Oxychloride for Ceramics and Refractories market growth, globally and by region?

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

How do Zirconium Oxychloride for Ceramics and Refractories market opportunities vary by end market size?

How does Zirconium Oxychloride for Ceramics and Refractories break out by Type, by Application?

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