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Zinc Chemicals Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Zinc Oxide, Zinc Sulfate, Zinc Carbonate, Zinc Chloride and Others), By Application (Rubber Compounding, Agriculture, Glass & Ceramics, Paint & Coatings, Food & Pharmaceuticals, Textiles, Chemicals and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Zinc Chemicals Market is projected to expand from USD 11.29 Billion in 2025 to USD 14.71 Billion by 2031, registering a CAGR of 4.51% over the forecast period. These chemicals, which include compounds like zinc oxide, zinc sulfate, and zinc chloride, serve as vital additives in sectors such as rubber processing, agriculture, and pharmaceuticals. Market growth is largely underpinned by the automotive industry's demand for zinc oxide in tire production and the agricultural sector's need for zinc fertilizers to enhance crop yields. The International Lead and Zinc Study Group forecasts that global demand for refined zinc metal will increase by 1.1% to reach 13.71 million tonnes in 2025.

However, the market faces significant hurdles due to raw material price volatility and supply chain instability. Fluctuations in the availability of zinc concentrate frequently lead to refined metal deficits, which drive up production costs for chemical manufacturers and squeeze profit margins. This instability compels industry stakeholders to navigate unpredictable feedstock expenses while striving to maintain competitive pricing within the global marketplace.

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Market Driver

The growth of the automotive tire and rubber vulcanization sector acts as a primary catalyst for market consumption, specifically boosting the demand for zinc oxide as a crucial activator. Zinc chemicals are essential for shortening vulcanization times and enhancing the physical durability of the final product, a requirement that is increasingly important as manufacturers scale operations to support the heavier loads of modern electric vehicle tires. This industrial reliance ensures a steady baseline of consumption for chemical additives, independent of broader economic shifts. According to the U.S. Tire Manufacturers Association's "2024 U.S. Tire Shipments Forecast" from August 2024, total U.S. tire shipments were projected to reach 337.4 million units, reflecting resilient industrial demand that correlates directly with increased raw material procurement.

Concurrently, rising demand for zinc-based agricultural micronutrients is shifting consumption patterns to address widespread soil deficiencies. Zinc sulfate plays a key role in plant physiology, facilitating enzymatic activity and protein synthesis that are vital for maximizing crop yields in intensive farming systems. The International Fertilizer Association's "Public Summary Medium-Term Fertilizer Outlook 2024-2028," released in May 2024, forecast a 4% rebound in global fertilizer consumption for the 2023-2024 year, signaling a robust recovery in agricultural input markets. To meet this expanding scope, producers are ramping up output; Hindustan Zinc Limited reported a record mined metal production of 1,079 kt for the 2024 fiscal year, highlighting the intense industrial effort required to satisfy these growing requirements.

Market Challenge

The volatility of raw material prices and supply chain stability serves as a substantial barrier to the expansion of the Global Zinc Chemicals Market. Unpredictable shifts in feedstock availability disrupt production schedules and inflate operational costs for chemical manufacturers. As the supply of zinc concentrate tightens, the resulting scarcity drives up prices for refined zinc, which is the primary input for key derivatives like zinc oxide and zinc sulfate. Consequently, manufacturers struggle to maintain stable pricing structures for end-users in the automotive and agricultural sectors, leading to reduced procurement volumes and compressed profit margins that stifle investment in capacity growth.

This constraint on market development is evidenced by recent supply deficits that highlight the fragility of the upstream value chain. According to the International Lead

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and Zinc Study Group, the global refined zinc metal market recorded a deficit of 62,000 tonnes in 2024. This shortfall was exacerbated by a concurrent decline in mine production, limiting the essential feedstock required for chemical processing. Such persistent deficits directly restrict the volume of raw materials available for manufacturers, thereby impeding the overall growth trajectory of the zinc chemicals industry.

Market Trends

The commercialization of Zinc-Air and Zinc-Ion battery technologies is positioning zinc as a critical material for renewable energy storage, distinct from its traditional galvanic uses. Unlike lithium-ion counterparts, these zinc-based chemistries offer superior fire safety and abundant raw material availability, making them ideal for stationary grid stabilization and industrial microgrids. This shift drives chemical producers to develop high-purity battery-grade zinc powders and electrolytes to meet the stringent specifications of energy storage manufacturers. According to Eos Energy Enterprises' "Third Quarter 2024 Financial Results" in November 2024, the company reported a confirmed orders backlog of $588.9 million for its zinc-based energy storage systems, reflecting the accelerating industrial adoption of this alternative battery chemistry.

Simultaneously, the transition to green synthesis and low-carbon zinc manufacturing is redefining production standards as producers aim to decarbonize the upstream value chain. This trend involves replacing fossil-fuel-intensive smelting processes with renewable energy-powered electrolysis and utilizing recycled feedstock to minimize environmental impact. Chemical manufacturers are responding to downstream pressure from automotive and construction clients who require certified low-carbon inputs to achieve their own Scope 3 emission reduction targets. According to Hindustan Zinc Limited's "Climate Action Report 2024-25" from September 2024, the company launched EcoZen, a branded low-carbon product verified to have a carbon footprint of less than one tonne of carbon dioxide equivalent per tonne of zinc, setting a new benchmark for sustainable material sourcing.

Key Market Players

Umicore NV/SA

Grillo-Werke AG

Zinc Nacional

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EverZinc Group SA

Hakusui Tech Co., Ltd.

Zinc Oxide LLC

Rubamin Private Limited

Global Chemical Co., Ltd.

Weifang Longda Zinc Industry Co., Ltd.

BASF SE

Report Scope

In this report, the Global Zinc Chemicals Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Zinc Chemicals Market, By Type

Zinc Oxide

Zinc Sulfate

Zinc Carbonate

Zinc Chloride and Others

Zinc Chemicals Market, By Application

Rubber Compounding

Agriculture

Glass & Ceramics

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South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Zinc Chemicals Market.

Available Customizations:

Global Zinc Chemicals Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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