



Global Zinc Oxide Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 5.6 bn
Forecast (2031)	USD 7.7 bn
CAGR (2021-2031)	5.5%
Study period	2021-2031
Largest region	Asia-Pacific · 47.8%
Fastest-growing region	Asia-Pacific · 6.2%
Market concentration	Moderate
Licence	Individual / Company

The global zinc oxide market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Rubber and tire manufacturing remains the principal demand center, while pharmaceutical, personal-care, electronics and battery grades generate the strongest value growth. Asia-Pacific accounted for XX% of 2025 revenue and will outpace the global market as tire output, vehicle production, ceramics and specialty-chemical capacity expand across China, India and Southeast Asia. Competitive advantage increasingly rests on recycled-zinc sourcing, energy-efficient furnaces, application-specific particle engineering and regulatory-grade production systems.

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Executive summary

The global zinc oxide market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Rubber and tire manufacturing remains the principal demand center, while pharmaceutical, personal-care, electronics and battery grades generate the strongest value growth. Asia-Pacific accounted for XX% of 2025 revenue and will outpace the global market as tire output, vehicle production, ceramics and specialty-chemical capacity expand across China, India and Southeast Asia. Competitive advantage increasingly rests on recycled-zinc sourcing, energy-efficient furnaces, application-specific particle engineering and regulatory-grade production systems.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global zinc oxide revenue reached USD XXX billion in 2025 on demand of approximately XXX metric tons.
- The market will reach USD XXX billion and XXX metric tons by 2031, representing value and volume CAGRs of XX% and XX%, respectively.
- Rubber and tire applications generated XX% of global zinc oxide revenue in 2025 because zinc oxide remains central to sulfur vulcanization, heat management and compound durability.
- Asia-Pacific represented XX% of 2025 market value and will grow at XX% through 2031.
- Indirect French-process material accounted for XX% of 2025 revenue, supported by its purity, consistent morphology and acceptance among major tire producers.
- The International Lead and Zinc Study Group forecast global refined-zinc demand of XXX metric tons in 2026, a XX% annual increase.
- The U.S. Geological Survey reported that the United States was XX% net-import-reliant for refined zinc in 2025, maintaining raw-material exposure for domestic zinc oxide producers.
- EverZinc reported that recycled feedstock supplied XX% of zinc used in its zinc oxide production lines during 2024.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Zinc Oxide Market Trends and Growth Drivers

Zinc oxide sits at the intersection of metal markets and specialty chemicals. Producer economics are shaped first by refined-zinc or secondary-feedstock costs and furnace utilization, then by the technical premium earned from purity, morphology, dispersion and customer qualification.

The market's volume engine remains tire and rubber manufacturing, where zinc oxide performs a deeply embedded functional role. Growth is nevertheless becoming more value-intensive as personal care, pharmaceuticals, electronics and high-performance industrial compounds demand narrower specifications and stronger regulatory documentation.

Regional competitiveness increasingly depends on circular feedstock access, energy efficiency and proximity to large customers. Producers that integrate residue recovery with multi-grade zinc oxide capacity can reduce raw-material risk while meeting procurement requirements for recycled content and product-carbon transparency.

Growth drivers

Tire output and replacement demand

Tire manufacturing anchors global zinc oxide consumption because the material activates sulfur vulcanization and influences cure rate, heat build-up and mechanical performance. Growth in vehicle fleets, commercial transport and replacement cycles supports recurring demand even when original-equipment vehicle production slows.

Mineral sunscreen adoption

Zinc oxide provides broad-spectrum UVA and UVB protection and benefits from regulatory acceptance in major cosmetic markets. Demand is moving toward coated, transparent and carefully controlled particle grades that reduce whitening while meeting safety, dispersion and labeling requirements.

Specialty rubber intensity

Industrial belts, hoses, footwear, seals, wire insulation and engineered elastomers expand the addressable market beyond tires. Higher-performance compounds require tighter surface area, impurity and dispersion specifications, supporting premium grades and long supplier relationships.

Agricultural zinc deficiency management

Fertilizer formulators and feed producers use zinc oxide as a concentrated micronutrient source for plants and animals. Intensification of crop yields and greater attention to formulated animal nutrition support demand, especially across Asia-Pacific, Latin America and the Middle East.

Electronics and energy-storage applications

High-purity zinc oxide is gaining value in varistors, ferrites, sensors, conductive ceramics and emerging battery architectures. These applications consume lower tonnage than rubber but command higher unit

prices and require controlled morphology, surface chemistry and trace-metal content.

Circular feedstock adoption

Recovery of zinc from galvanizing residues, brass ash and other secondary streams reduces exposure to primary-metal procurement and strengthens customers' product-carbon claims. Producers with refining integration and reliable residue networks can improve both margin stability and tender competitiveness.

Restraints

Zinc price volatility

Refined zinc is the principal variable cost for French-process producers, while residue-based routes remain exposed to metal-linked feedstock pricing. Rapid price changes raise working-capital requirements and can compress margins when customer contracts reset more slowly than input costs.

Energy and emissions compliance

Zinc vaporization and oxidation require substantial thermal energy, making furnace economics sensitive to natural-gas and electricity prices. Capital requirements for dust capture, worker protection and emissions control place smaller or older facilities at a structural disadvantage.

Fine-powder environmental controls

Zinc oxide carries aquatic-toxicity classifications in the European Union, while nanoscale and inhalable grades require disciplined exposure management. Registration, testing, safety-data and stewardship costs lengthen development cycles for new formulations and end uses.

Material efficiency and substitution

Tire and rubber compounders continually optimize zinc oxide loading to reduce cost and environmental footprint, and activated grades can deliver equivalent performance at lower dosage. Alternative curing systems and other UV-filter ingredients also limit volume growth in selected applications.

Zinc Oxide Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Tire output and replacement demand	XXX	XXX	XXX
Mineral sunscreen adoption	XXX	XXX	XXX
Specialty rubber intensity	XXX	XXX	XXX
Agricultural zinc deficiency management	XXX	XXX	XXX
Electronics and energy-storage applications	XXX	XXX	XXX
Circular feedstock adoption	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Zinc price volatility	XXX	XXX	XXX
Energy and emissions compliance	XXX	XXX	XXX
Fine-powder environmental controls	XXX	XXX	XXX
Material efficiency and substitution	XXX	XXX	XXX

Source: XXX

Zinc Oxide Market Segmentation by Process, Grade and Application

By Process

French-process zinc oxide leads because refined-metal feedstock produces consistent purity, color and particle characteristics required by tires, pharmaceuticals and personal care. The direct American process remains important for cost-sensitive rubber, ceramics and agriculture, particularly where suitable ores or zinc residues are available. Wet-chemical routes will grow fastest as demand rises for nanoscale, high-surface-area and electronic-grade products.

Value by process, USD bn

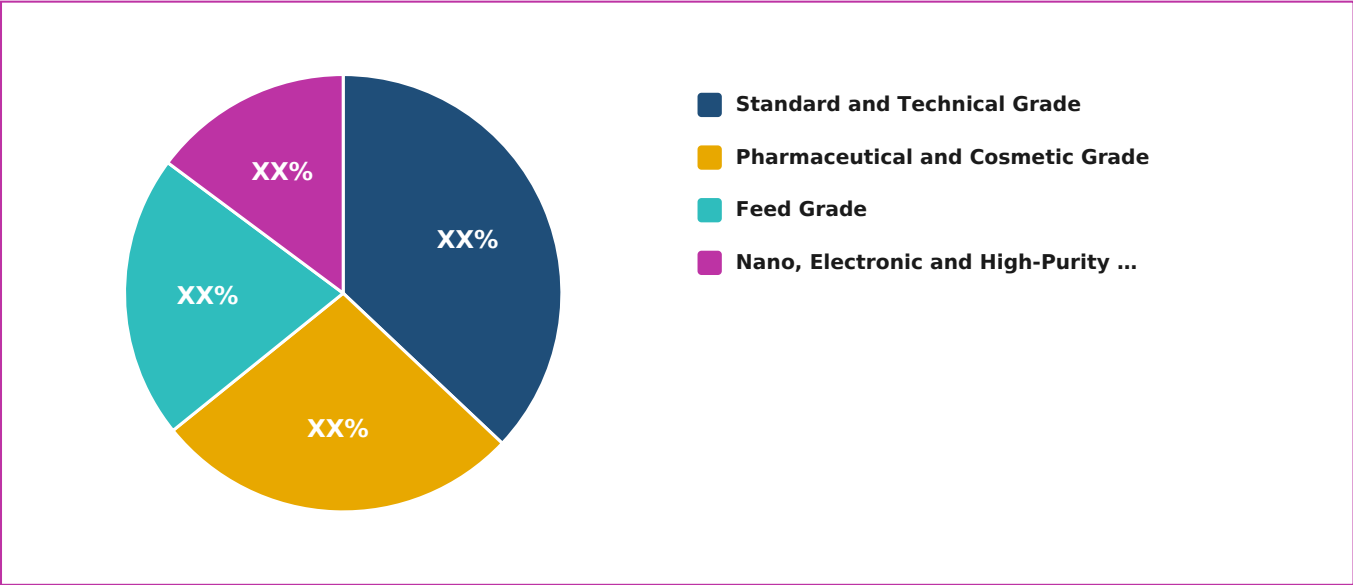
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Indirect French Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct American Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wet Chemical and Other Processes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Standard technical material dominates tire, rubber, ceramics and general chemical consumption. Pharmaceutical and cosmetic grades command substantial premiums for purity, traceability and particle engineering, while feed grade benefits from formulated animal nutrition. Nano and electronic grades form the fastest-growing category as sensor, varistor, transparent UV-protection and energy-storage applications commercialize.

Value share by grade, 2025



Source: XXX

Value by grade, USD bn

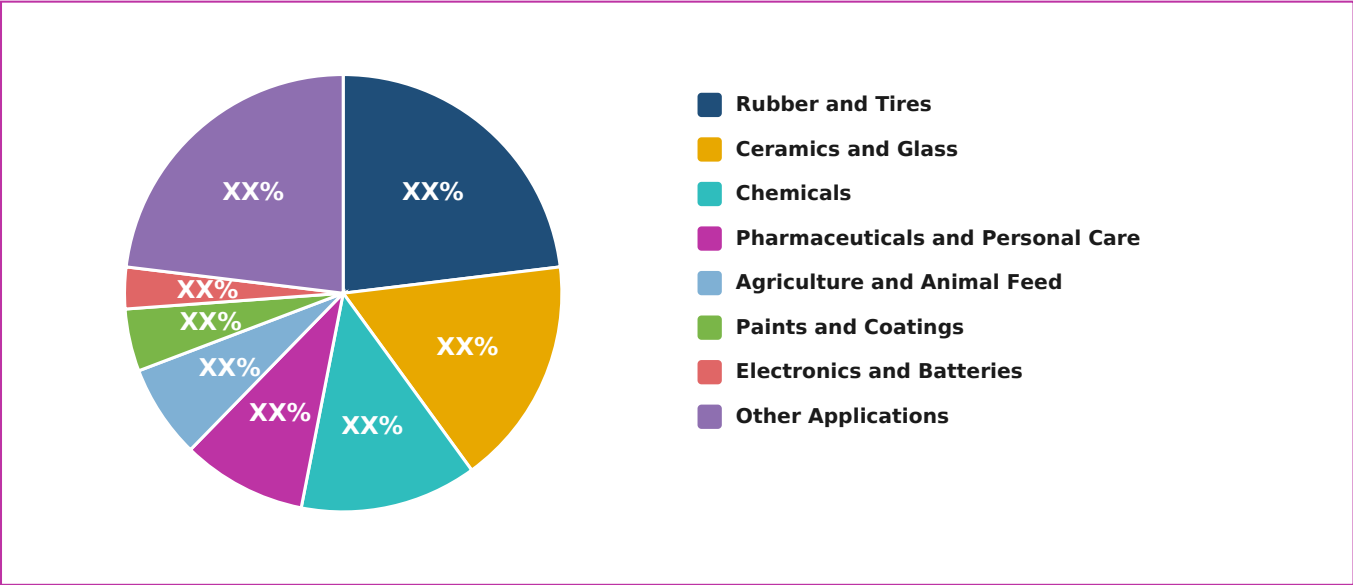
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standard and Technical Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical and Cosmetic Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feed Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nano, Electronic and High-Purity Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Rubber and tire production is the demand anchor because zinc oxide is embedded in established vulcanization systems and multinational compound specifications. Ceramics, chemicals and coatings provide diversified industrial demand, while pharmaceutical and personal-care products increase the premium-grade mix. Electronics and batteries will grow fastest from a smaller base as high-purity zinc oxide penetrates varistors, sensors, conductive ceramics and energy-storage components.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Rubber and Tires	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ceramics and Glass	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chemicals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals and Personal Care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Agriculture and Animal Feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paints and Coatings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Electronics and Batteries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Particle Form

Conventional powders remain the commercial standard for tires, general rubber, ceramics, feed and chemical manufacture. Nano and ultrafine forms gain value where transparency, UV attenuation, catalytic surface area or electronic performance is required. Growth depends on surface treatment, dispersion systems and compliance with nanomaterial-specific documentation and exposure controls.

Value by particle Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional Zinc Oxide	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nano and Ultrafine Zinc Oxide	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

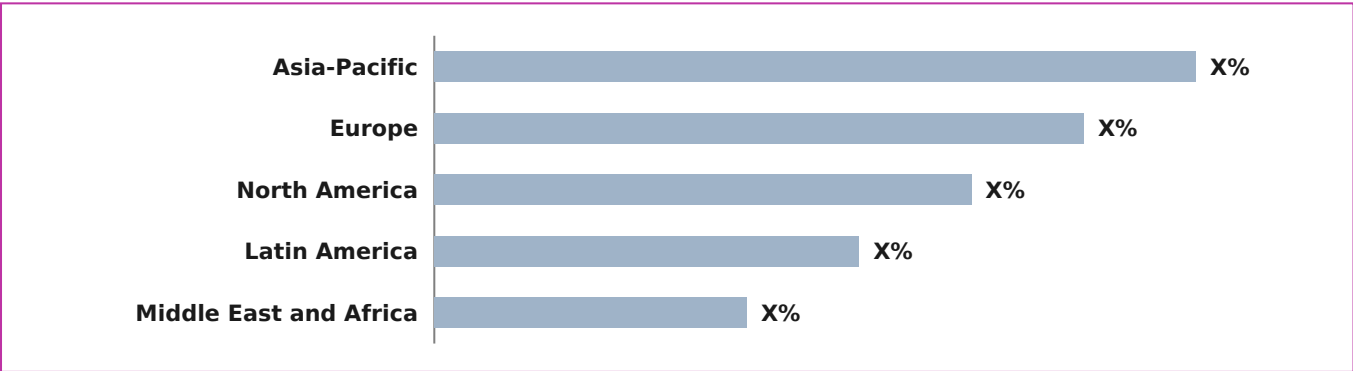
Zinc Oxide Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global revenue in 2025 and is forecast to advance at XX% through 2031. China remains the largest production and consumption center, supported by its tire, ceramics, electronics and chemical industries, while India supplies the strongest incremental growth through tire investment, expanding domestic vehicle fleets and new zinc-chemical capacity. Japan and South Korea sustain premium demand for high-purity ceramic, electronic and personal-care grades.

Europe represented XX% of 2025 value. Regional tonnage growth is moderate, but the sales mix favors traceable, pharmaceutical, cosmetic and lower-carbon material. Germany, Italy, France and Central Europe remain important tire, technical-rubber and ceramics markets, while REACH, CLP and customer carbon-accounting requirements reward producers using recycled feedstocks and efficient furnaces.

North America accounted for XX% of revenue, led by U.S. tire, rubber, chemical and personal-care consumption. Local producers benefit from proximity and technical service, although U.S. dependence on imported refined zinc increases raw-material risk. Latin America and the Middle East and Africa collectively represented XX%, with growth concentrated in Brazilian and Mexican tires, GCC ceramics and construction materials, African agriculture and regional industrialization.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Zinc Oxide Market Competitive Landscape and Company Share

The global zinc oxide market has moderate concentration: multinational specialists lead premium and multinational-customer contracts, while numerous regional producers compete in standard technical grades. EverZinc, Zochem, JG Chemicals, Grillo-Werke and leading Asian suppliers combine process expertise, application laboratories and multi-grade portfolios, but no supplier controls a dominant global share.

The 2022 combination of EverZinc and U.S. Zinc created a zinc-specialty platform with 14 facilities across North America, Europe and Asia. More recent investment has centered on efficient furnace capacity, secondary-zinc refining, pharmaceutical and cosmetic quality systems and geographic expansion, illustrated by Zochem's U.S. furnace investment and JG Chemicals' planned Dahej project.

Competitive differentiation is shifting from nominal purity toward particle-size distribution, surface area, dispersion, cure behavior, trace-metal control, recycled content and batch-level documentation. Producers able to qualify across multinational tire, pharmaceutical and personal-care customers can sustain stronger utilization and pricing than commodity suppliers dependent on spot exports.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
EverZinc	XXX	XXX	XXX	XXX
Zochem LLC	XXX	XXX	XXX	XXX
J.G. Chemicals Limited	XXX	XXX	XXX	XXX
Grillo-Werke AG	XXX	XXX	XXX	XXX
Zinc Nacional	XXX	XXX	XXX	XXX
Rubamin Limited	XXX	XXX	XXX	XXX
Silox India Private Limited	XXX	XXX	XXX	XXX
Pan-Continental Chemical Co., Ltd.	XXX	XXX	XXX	XXX
HakusuiTech Co., Ltd.	XXX	XXX	XXX	XXX
Mario Pilato Blat S.A.	XXX	XXX	XXX	XXX

Source: XXX

Zinc Oxide Market Forecast and Investment Opportunities

The market will add USD XXX billion in annual revenue between 2025 and 2031. Rubber and tires will contribute the largest absolute increment, while electronics, batteries, pharmaceutical and personal-care grades will deliver the fastest percentage growth and an increasing share of industry margin.

The base-case forecast assumes continued expansion in global vehicle fleets, measured growth in refined-zinc availability and disciplined pass-through of metal costs. A stronger scenario emerges if Asian tire capacity, mineral sunscreen adoption and energy-storage applications scale faster; a weaker case would result from a prolonged industrial downturn, zinc-price shocks or accelerated dosage reduction in rubber compounds.

Winning suppliers will combine regional production, diversified zinc sourcing, recoverable secondary feedstocks and application-development capabilities. Investments that lower energy use, improve powder capture and produce multiple high-value grades on flexible lines will generate better returns than undifferentiated commodity capacity.

Opportunities

- Low-activation zinc oxide formulations that reduce tire compound dosage
- Surface-treated and transparent zinc oxide for premium sun care
- High-purity zinc oxide for varistors, sensors and energy-storage systems
- Regional capacity additions in India, Southeast Asia and the Middle East
- Closed-loop recovery of zinc-bearing residues
- Digital batch traceability for pharmaceutical, cosmetic and automotive customers

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