

## **Sodium Chlorate Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

Market Report | 2025-08-13 | 176 pages | EMR Inc.

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### **Report description:**

The global sodium chlorate market was valued at USD 2778.04 Million in 2024 . Rising demand for renewable electricity-based chlorate production is enhancing sustainability across industrial bleaching processes. As a result, the market is expected to grow at a CAGR of 2.70% during the forecast period of 2025-2034 to reach a value of USD 3626.13 Million by 2034 .

The growing global push for elemental chlorine-free (ECF) pulp production, primarily in developed economies is one of the major trends noticed in the market. ECF processes, which rely heavily on sodium chlorate for chlorine dioxide generation, are gaining preference over traditional bleaching methods due to lower dioxin formation and improved pulp brightness. According to the Confederation of European Paper Industries (CEPI), Europe's pulp production significantly increased in 2024, whereas paper and board consumption increased by 7.5%. Such shifts are accelerating demand in the sodium chlorate market in line with environmental mandates, particularly across Europe and North America.

Government-backed sustainability programmes are also fuelling demand. The United States EPA's Integrated Risk Information System (IRIS) encourages ECF methods for pulp manufacturing, while Canada's Pulp and Paper Effluent Regulations are tightening emissions standards, indirectly promoting chlorate-based solutions. Meanwhile, innovation in electrochemical production routes using renewable electricity sources in Nordic countries is emerging as a cleaner sodium chlorate manufacturing model, attracting industrial partnerships and policy support, reshaping the sodium chlorate market dynamics.

### **Key Trends and Recent Developments**

July 2025

Kemira announced an investment to increase the capacity of its Ortigueira, Brazil-based factory that produces sodium chlorate. Brazil is the region's top producer of bleached pulp, and the investment, which is a strategic priority for Kemira's Pulp & Paper

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business, will allow Kemira to respond to the sodium chlorate market's ongoing growth in South America.

April 2025

Gujarat Alkalies and Chemicals Limited (GACL), one of the nation's top chlor-alkali giants, marked the start of the first lot of benzoyl chloride production. In front of GACL's senior executives and other guests, Smt. Avantika Singh, Managing Director of GACL, conducted the flag-off digitally. This launch reflects its ongoing diversification, potentially freeing chlorate production capacity for pulp and chemical industries.

March 2025

Nouryon introduced a new low-carbon hydrogen peroxide product called Eka HP Puroxide™. Nouryon is the first Nordic firm to offer this solution, which lowers Scope 3 greenhouse gas emissions in the mining, pulp and paper, and water treatment industries by offering a sustainable substitute. Nouryon's Eka HP Puroxide showcases its focus on sustainable chemical solutions, indirectly boosting demand for complementary green chlorate products in pulp and mining sectors and propelling the sodium chlorate market development.

September 2024

Nouryon announced that it has started producing hydrogen peroxide, sodium chlorate, and chlorine dioxide at its new Integrated Manufacturing Model site in Ribas do Rio Pardo, Mato Grosso do Sul, Brazil. This facility enhances regional sodium chlorate supply security, supporting Latin America's expanding ECF pulp production and export operations.

Shift Towards Elemental Chlorine-Free (ECF) Pulping Processes

Sodium chlorate's central role in generating chlorine dioxide makes it critical in ECF pulping, a method now considered the industry norm in developed economies. Majority of the bleached pulp in the United States and Canada now employs ECF technology, primarily due to stringent environmental norms. For instance, under Canada's Environmental Performance Agreements for Pulp and Paper, mills using ECF methods receive tax incentives and expedited permitting. This has translated into consistent, large-scale sodium chlorate demand.

Green Energy Integration in Chlorate Production

Traditional sodium chlorate production is energy-intensive, often relying on fossil fuels. However, Scandinavian countries, particularly Sweden and Finland, are now integrating hydroelectricity and wind power into chlorate electrolysis units. In May 2024, Eka Chemicals (now Nouryon) announced a 100% renewable-powered chlorate facility in Ornskoldsvik, Sweden, reducing CO<sub>2</sub> emissions to a considerable extent, accelerating the sodium chlorate industry growth. Such shifts align with the EU's Green Deal and REPowerEU plans, which encourage decarbonisation of chemical production.

Expanding Use in Explosives for Mining and Infrastructure

Sodium chlorate is gaining traction as an oxidising agent in emulsion explosives for mining. With global infrastructure investments rising, such as India's National Infrastructure Pipeline (NIP) and the United States Bipartisan Infrastructure Law, demand for commercial explosives has surged. Companies like Orica and MAXAM have reported substantial growth in this regard. Sodium chlorate's stability and high oxygen content make it ideal for emulsion formulations, especially in remote sites where safety and shelf-life are critical. Its non-nitrate composition also makes it increasingly favourable in environments with groundwater sensitivity, boosting the sodium chlorate market scope.

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## Advancements in Chlorate Derivatives for Speciality Chemicals

Recent R&D in the field of metal chlorates, like magnesium and zinc chlorate, is creating new commercial pathways. These compounds, derived from sodium chlorate, are being explored for use in propellants, disinfectants, and specialty oxidisers. Government-funded labs in Germany and Japan are exploring chlorate-based ion carriers for lithium-free battery alternatives, suggesting future downstream demand for sodium chlorate. These derivative markets are projected to become significant end-use categories over the next decade.

## Tightening Global Regulations on Bleach Alternatives

Global regulations are tightening on chlorine gas and hypochlorite-based bleaching due to carcinogenic by-product concerns. For instance, under the EU REACH regulations, several conventional bleach chemicals are now classified as Substances of Very High Concern (SVHCs). Sodium chlorate-based chlorine dioxide offers a safer alternative, with lower trihalomethane (THM) and dioxin levels in effluents.

## Global Sodium Chlorate Industry Segmentation

The EMR's report titled "Global Sodium Chlorate Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

### Market Breakup by Form

- Crystalline
- Solution

Key Insight: Crystalline form remains dominant in the market, driven by its storage stability, safe handling, and compatibility with large-scale ECF bleaching setups. This format fits well with traditional pulp mills that value shelf life and consistent reactivity. In contrast, the solution form is gaining momentum in digitally integrated and high-throughput operations, boosting the sodium chlorate consumption. Its ready-to-use nature aligns with automation-driven facilities where chemical accuracy and flow continuity are critical.

### Market Breakup by Application

- Pulp and Bleaching Industry
- Chlorates of Other Metals
- Leather Tanning
- Dyes
- Others

Key Insight: Application-wise, the industry is anchored by its role in the pulp and bleaching industry, which continues to be the core growth engine due to regulatory push toward chlorine-free processes. The product's clean oxidation profile and ECF compatibility keep it indispensable. At the same time, emerging uses in synthesising other metal chlorates are opening new sodium chlorate market opportunities. Innovations in high-performance materials, electronics, and defence are increasingly reliant on chlorate derivatives, drawing demand beyond pulp.

### Market Breakup by Region

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- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Key Insight: The regional sodium chlorate market dynamics is shaped by the balance of infrastructure maturity and industrial expansion. North America leads with well-integrated chlorate production facilities, strong environmental compliance, and established pulp manufacturers, driving predictable consumption. In contrast, Asia Pacific is witnessing robust growth, propelled by capacity additions and rising ECF adoption in paper and mining sectors. As environmental norms tighten and industrial technologies evolve, demand is shifting toward regions ready to invest in efficiency, sustainability, and scale.

#### Global Sodium Chlorate Market Share

##### Crystalline Form Clocks in Majority of the Market Shares Due to Stability and Transport Safety

Crystalline sodium chlorate continues to lead the global market primarily due to its excellent chemical stability and ease of handling. Pulp and paper manufacturers prefer crystalline form for its prolonged shelf life and reduced storage hazards, especially in remote or high-capacity sites across Canada, Finland, and Chile. It is also better suited for long-distance transport, particularly in bulk container shipping. Moreover, the crystalline form allows controlled chlorine dioxide generation, which is essential for compliance with international safety and environmental protocols, further accelerating demand in the sodium chlorate market.

Solution-based sodium chlorate is increasingly gaining traction in fast-paced, continuous-operation environments, especially across modern pulp mills in Asia-Pacific and Latin America. Its pre-dissolved form integrates seamlessly into automated chlorine dioxide generators, eliminating on-site mixing processes and reducing human intervention. With increasing adoption of smart factory systems in China and Indonesia, demand for solution form is rising, particularly for facilities with compact layouts or digital integration needs.

##### Pulp and Bleaching Applications Account for the Largest Market Share Due to Widespread ECF Adoption

The pulp and bleaching applications boast the maximum sodium chlorate consumption, largely driven by the shift to elemental chlorine-free (ECF) bleaching technologies. With growing restrictions on chlorine gas and traditional bleach agents, chlorate-based chlorine dioxide has become the preferred solution globally. Its ability to deliver brightness while reducing harmful effluents keeps this application firmly dominant in the global market.

The chlorates of other metals category, particularly those of magnesium, zinc, and calcium, is experiencing notable momentum in the sodium chlorate market as industries diversify their use of chlorate-based compounds. Sodium chlorate is increasingly being used as a key precursor in developing advanced formulations for high-energy fuels, clean disinfectants, and specialised oxidisers. Research institutions and industry players are jointly exploring these applications, with backing from initiatives like the European Defence Fund and Japan's NEDO.

#### Global Sodium Chlorate Market Regional Analysis

##### North America Secures the Leading Position in the Global Industry Due to Integrated Production and Regulatory Favourability

North America dominates the sodium chlorate market revenue due to its integrated supply chains, renewable energy

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infrastructure, and widespread ECF compliance across the pulp sector. Canada, home to major chlorate manufacturers, benefits from proximity to both raw materials and pulp producers. Regulatory alignment, such as Environment Canada's chlorate safety framework, ensures stable demand while encouraging cleaner production. The presence of long-standing chemical firms like ERCO and Nouryon strengthens supply continuity, while public funding for sustainability upgrades keeps the region competitive on a global scale.

Asia Pacific is emerging as the fastest-growing regional sodium chlorate market, driven by rapid pulp capacity expansion, infrastructure development, and environmental standard upgrades. Countries like China, India, and Indonesia are investing in chlorine dioxide-based ECF pulp lines as they target export-grade paper products. Moreover, rising demand for chlorate-based emulsion explosives in the mining and tunnelling sectors further boosts its application.

### Competitive Landscape

The global market is witnessing steady consolidation. Key sodium chlorate market players are focusing on green manufacturing, regional supply chain expansion, and downstream application diversification. Partnering with pulp mills adopting elemental chlorine-free bleaching, and in catering to niche high-value segments such as metal chlorate production and mining explosives have become central areas of focus.

Sodium chlorate companies are also investing in renewable-powered electrolysis facilities, especially in Europe, to gain a sustainability edge. Additionally, custom-grade chlorate solutions for fully automated pulp lines are emerging as a lucrative niche. Expanding into emerging economies like Indonesia, Vietnam, and India, where pulp capacity is rapidly growing, also presents untapped potential for chlorate manufacturers.

#### Kemira Oyj

Kemira Oyj, established in 1920 and headquartered in Helsinki, Finland, is known for its commitment to sustainable pulp chemistry. It supplies high-purity sodium chlorate and focuses on ECF-grade bleaching products, supported by renewable-powered plants across Northern Europe.

#### Shree Chlorates Pvt. Ltd.

Shree Chlorates Pvt. Ltd., founded in 1987 and based in India, caters to the domestic paper and defence markets. It is actively innovating in small-scale, containerised chlorate production units to serve decentralised industries in Asia and Africa.

#### Nouryon Chemicals Holding B.V.

Nouryon Chemicals Holding B.V., formed in 2017 and headquartered in Amsterdam, Netherlands, leads in green chlorate production. Its fully renewable-powered plant in Sweden is pioneering low-carbon chlorate exports to global pulp clients.

#### ERCO Worldwide LP

ERCO Worldwide LP, founded in 1897 and headquartered in Canada, serves North American markets with vertically integrated chlorate-to-chlorine dioxide solutions. Its advanced automation systems allow direct integration with pulp mill operations, boosting operational efficiency and safety.

Other key players in the market are Arkema Group, Chemtrade Logistics Inc., and China Salt Inner Mongolia Chemical Co., Ltd., among others.

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## Key Highlights of the Global Sodium Chlorate Market Report:

- Evaluation of low-carbon chlorate production and renewable-powered electrolysis breakthroughs
- Profiles of leading global and niche chlorate producers with operational and innovation benchmarks
- Regional demand mapping linked to ECF pulp mill expansions and mining sector investments
- Detailed insights into value chain evolution, from chlorate manufacturing to advanced derivative applications
- Exploration of emerging tech use cases including battery chemistry and aerospace-grade oxidisers
- Supply-side assessment covering logistics, energy dependencies, and regulatory compliance metrics

## Why Rely on Expert Market Research?

- Industry-recognised expertise across pulp chemicals, explosives, and fine inorganic compounds
- Intelligence designed specifically for B2B stakeholders navigating regulatory shifts and procurement strategies
- Multi-level research incorporating policy tracking, patent analysis, and operational interviews
- Decision-ready deliverables enriched with scenario modelling, opportunity matrices, and cost-sensitivity insights
- Deep understanding of regional developments, ensuring localised perspectives within a global framework

## Call to Action

Explore the latest trends shaping the sodium chlorate market 2025-2034 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customized consultation on sodium chlorate market trends 2025 .

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