

# **Global Recycled Refractories Market Size Study, by Product (Silica, Alumina, Magnesia), by End-use (Iron & Steel, Cement & Lime, Glass & Ceramics, Non-Ferrous Metals), and Regional Forecasts 2022-2032**

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## **Abstracts**

The Global Recycled Refractories Market is valued at approximately USD 12.53 billion in 2023 and is expected to grow at a CAGR of 8.6% over the forecast period 2024-2032. The rising emphasis on sustainable industrial practices and the increasing adoption of circular economy models drive the demand for recycled refractories. Industries such as iron & steel, cement & lime, glass & ceramics, and non-ferrous metals are increasingly turning to recycled refractories as a cost-effective and environmentally friendly alternative to virgin raw materials.

The growing concern over resource depletion and high costs of raw materials has prompted industries to seek alternatives, with recycling technology advancements improving the feasibility of reusing refractories. Traditional refractory materials, including alumina, silica, and magnesia, are critical to high-temperature industrial operations, but their mining and processing have significant environmental impacts. Recycling these materials not only reduces carbon emissions and industrial waste but also enhances the supply chain's resilience by lowering dependency on newly mined materials.

Regulatory mandates across major economies are further propelling the adoption of sustainable refractory solutions. Environmental policies aimed at minimizing industrial waste and promoting recycling initiatives have encouraged companies to develop and integrate innovative recycling methods into their operations. In June 2024, MIRECO, a joint venture between RHI Magnesita and Horn & Co. Group, expanded its operations in Italy with the acquisition of Refrattari Trezzi, a key player in refractory recycling. This strategic move reinforces MIRECO's commitment to circular economy practices and

sustainable material supply chains.

The demand for recycled refractories in the iron & steel industry is particularly strong, as steelmakers seek to reduce operational costs and enhance sustainability efforts. Meanwhile, the cement industry is experiencing increased adoption of recycled refractories, driven by global urbanization, infrastructure expansion, and stricter emission regulations. Glass & ceramics and non-ferrous metal industries are also increasing their reliance on recycled materials to optimize production costs and comply with environmental standards.

Asia-Pacific is the dominant region in the global recycled refractories market, with China and India leading industrial expansion and rapidly implementing recycling technologies. The North American and European markets are also witnessing substantial growth, driven by regulatory pressures, sustainability goals, and technological advancements in refractory recycling. Latin America, the Middle East, and Africa present emerging opportunities, particularly in metallurgical and cement industries.

#### Major Market Players Included in This Report:

RHI Magnesita

Krosaki Harima Corporation

Deref S.p.A.

Harsco Corporation

Global Recycling

HORN & CO. GROUP

LKAB Minerals

Mineralen Koll?e

REF Minerals

Jai Balajee Trading Co.

Valoref (Saint-Gobain)

The Detailed Segments and Sub-Segments of the Market are Explained Below:

By Product:

Silica

Alumina

Magnesia

Others

By End-use:

Iron & Steel

Cement & Lime

Glass & Ceramics

Non-Ferrous Metals

Others

By Region:

North America

U.S.

Canada

Mexico

## Europe

Germany

France

Russia

UK

## Asia-Pacific

China

India

Japan

South Korea

## Central & South America

Brazil

## Middle East & Africa

Saudi Arabia

## Years Considered for the Study:

Historical Year – 2022

Base Year – 2023

Forecast Period – 2024 to 2032

### Key Takeaways:

Market Estimates & Forecast for 10 years (2022-2032)

Annualized revenues and regional-level analysis for each market segment

Comprehensive analysis of geographical landscape with country-level insights

Competitive landscape and market positioning of key players

Evaluation of key business strategies and recommendations for market participants

Demand-side and supply-side dynamics analysis

## Contents

### **CHAPTER 1. GLOBAL RECYCLED REFRACTORIES MARKET EXECUTIVE SUMMARY**

- 1.1. Global Recycled Refractories Market Size & Forecast (2022-2032)
- 1.2. Regional Summary
- 1.3. Segmental Summary
  - 1.3.1. By Product
  - 1.3.2. By End-use
- 1.4. Key Trends
- 1.5. Recession Impact
- 1.6. Analyst Recommendation & Conclusion

### **CHAPTER 2. GLOBAL RECYCLED REFRACTORIES MARKET DEFINITION AND RESEARCH ASSUMPTIONS**

- 2.1. Research Objective
- 2.2. Market Definition
- 2.3. Research Assumptions
  - 2.3.1. Inclusion & Exclusion
  - 2.3.2. Limitations
  - 2.3.3. Supply Side Analysis
    - 2.3.3.1. Availability
    - 2.3.3.2. Infrastructure
    - 2.3.3.3. Regulatory Environment
    - 2.3.3.4. Market Competition
    - 2.3.3.5. Economic Viability (Consumer's Perspective)
  - 2.3.4. Demand Side Analysis
    - 2.3.4.1. Regulatory Frameworks
    - 2.3.4.2. Technological Advancements
    - 2.3.4.3. Environmental Considerations
    - 2.3.4.4. Consumer Awareness & Acceptance
- 2.4. Estimation Methodology
- 2.5. Years Considered for the Study
- 2.6. Currency Conversion Rates

### **CHAPTER 3. GLOBAL RECYCLED REFRACTORIES MARKET DYNAMICS**

### 3.1. Market Drivers

- 3.1.1. Rising demand for sustainable and eco-friendly refractory solutions
- 3.1.2. Cost-effectiveness of recycled refractories compared to virgin materials
- 3.1.3. Government regulations promoting recycling and waste reduction

### 3.2. Market Challenges

- 3.2.1. Variability in quality and performance of recycled refractories
- 3.2.2. Limited awareness and acceptance in some industries

### 3.3. Market Opportunities

- 3.3.1. Growth in circular economy initiatives in industrial sectors
- 3.3.2. Advancements in processing and separation technologies
- 3.3.3. Expansion of recycled refractory applications in emerging economies

## **CHAPTER 4. GLOBAL RECYCLED REFRACTORIES MARKET INDUSTRY ANALYSIS**

### 4.1. Porter's 5 Force Model

- 4.1.1. Bargaining Power of Suppliers
- 4.1.2. Bargaining Power of Buyers
- 4.1.3. Threat of New Entrants
- 4.1.4. Threat of Substitutes
- 4.1.5. Competitive Rivalry
- 4.1.6. Futuristic Approach to Porter's 5 Force Model
- 4.1.7. Porter's 5 Force Impact Analysis

### 4.2. PESTEL Analysis

- 4.2.1. Political
- 4.2.2. Economical
- 4.2.3. Social
- 4.2.4. Technological
- 4.2.5. Environmental
- 4.2.6. Legal

### 4.3. Top Investment Opportunities

### 4.4. Top Winning Strategies

### 4.5. Disruptive Trends

### 4.6. Industry Expert Perspective

### 4.7. Analyst Recommendation & Conclusion

## **CHAPTER 5. GLOBAL RECYCLED REFRACTORIES MARKET SIZE & FORECASTS BY PRODUCT 2022-2032**

### 5.1. Segment Dashboard

### 5.2. Global Recycled Refractories Market: Product Revenue Trend Analysis, 2022 & 2032 (USD Million)

#### 5.2.1. Silica

#### 5.2.2. Alumina

#### 5.2.3. Magnesite

#### 5.2.4. Others

## **CHAPTER 6. GLOBAL RECYCLED REFRACTORIES MARKET SIZE & FORECASTS BY END-USE 2022-2032**

### 6.1. Segment Dashboard

### 6.2. Global Recycled Refractories Market: End-use Revenue Trend Analysis, 2022 & 2032 (USD Million)

#### 6.2.1. Iron & Steel

#### 6.2.2. Cement & Lime

#### 6.2.3. Glass & Ceramics

#### 6.2.4. Non-Ferrous Metals

#### 6.2.5. Others

## **CHAPTER 7. GLOBAL RECYCLED REFRACTORIES MARKET SIZE & FORECASTS BY REGION 2022-2032**

### 7.1. North America Recycled Refractories Market

#### 7.1.1. U.S. Recycled Refractories Market

#### 7.1.2. Canada Recycled Refractories Market

#### 7.1.3. Mexico Recycled Refractories Market

### 7.2. Europe Recycled Refractories Market

#### 7.2.1. Germany Recycled Refractories Market

#### 7.2.2. France Recycled Refractories Market

#### 7.2.3. Russia Recycled Refractories Market

#### 7.2.4. UK Recycled Refractories Market

### 7.3. Asia-Pacific Recycled Refractories Market

#### 7.3.1. China Recycled Refractories Market

#### 7.3.2. India Recycled Refractories Market

#### 7.3.3. Japan Recycled Refractories Market

#### 7.3.4. South Korea Recycled Refractories Market

### 7.4. Central & South America Recycled Refractories Market

#### 7.4.1. Brazil Recycled Refractories Market

## 7.5. Middle East & Africa Recycled Refractories Market

### 7.5.1. Saudi Arabia Recycled Refractories Market

## **CHAPTER 8. COMPETITIVE INTELLIGENCE**

### 8.1. Key Company SWOT Analysis

#### 8.1.1. RHI Magnesita

#### 8.1.2. Krosaki Harima Corporation

#### 8.1.3. Deref S.p.A.

### 8.2. Top Market Strategies

### 8.3. Company Profiles

#### 8.3.1. Global Recycling

#### 8.3.2. Harsco Corporation

#### 8.3.3. HORN & CO. GROUP

#### 8.3.4. LKAB Minerals

#### 8.3.5. Mineralen Koll?e

#### 8.3.6. REF Minerals

#### 8.3.7. Jai Balajee Trading Co.

#### 8.3.8. Refratechnik

#### 8.3.9. Valoref (Saint-Gobain)

## **CHAPTER 9. RESEARCH PROCESS**

### 9.1. Research Process

#### 9.1.1. Data Mining

#### 9.1.2. Analysis

#### 9.1.3. Market Estimation

#### 9.1.4. Validation

#### 9.1.5. Publishing

### 9.2. Research Attributes

## List Of Tables

### LIST OF TABLES

- Global Recycled Refractories Market Estimates & Forecasts by Region 2022-2032
- Global Recycled Refractories Market Estimates & Forecasts by Product 2022-2032
- Global Recycled Refractories Market Estimates & Forecasts by End-use 2022-2032
- U.S. Recycled Refractories Market Estimates & Forecasts, 2022-2032
- China Recycled Refractories Market Estimates & Forecasts, 2022-2032
- Europe Recycled Refractories Market Estimates & Forecasts, 2022-2032
- Middle East & Africa Recycled Refractories Market Estimates & Forecasts, 2022-2032
- Company Market Share Analysis, 2023

This list is not complete; the final report contains more than 100 tables. The list may be updated in the final deliverable.

## List Of Figures

### LIST OF FIGURES

- Global Recycled Refractories Market Key Trends, 2023
- Global Recycled Refractories Market Growth Prospects 2022-2032
- Porter's Five Forces Analysis for Recycled Refractories Market
- Global Recycled Refractories Market Value Chain Analysis
- Company Market Share Analysis, 2023

This list is not complete; the final report contains more than 50 figures. The list may be updated in the final deliverable.

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