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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

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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

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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

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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

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