

# Global Opal Rough Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Opal Rough market size is expected to reach \$ 270 million by 2032, rising at a market growth of 2.4% CAGR during the forecast period (2026-2032).

Opal rough refers to natural opal that has not been cut, polished, or set, composed of hydrated silica ( $\text{SiO}_2 \cdot n\text{H}_2\text{O}$ ) with water content typically ranging from 3% to 10% and an amorphous structure. Approximately 95% of global opal production comes from Australia, with major mining areas including Lightning Ridge in New South Wales (black opal), Coober Pedy in South Australia (white opal), and the boulder opal belt in Queensland. Other sources include Queretaro in Mexico (fire opal), Wollo Province in Ethiopia (Ethiopian opal), Brazil, the United States, Honduras, Madagascar, and Indonesia. Based on play of color, opal is classified into precious opal (with play of color) and common opal (without play of color). Based on body color, it is further divided into black opal, white opal, fire opal (orange-red to reddish translucent), and boulder opal (natural combination with ironstone matrix). This category includes unworked opal rough under HS code 7103.1000 and opal simply sawn or roughly shaped under 7103.9100. Opal rough is the most upstream raw material in the jewelry value chain, and its value is determined by the intensity of play of color, body color, transparency, size, and origin.

Opal rough is among the most volatile natural gemstone categories in terms of unit price, with carat prices varying by a factor of a hundred depending on play of color intensity, body tone, and pattern quality. Black opal rough, due to its extreme rarity and the near-monopoly supply from Lightning Ridge, Australia, commands the high-end collector market, with fine pieces consistently achieving premium prices at auctions. White opal and boulder opal support the wider commercial jewelry segment at comparatively moderate price points.

Profit margins are heavily concentrated among miners who recover premium black or large fire opal rough, but such yields are exceptionally low; most operators rely on bulk sales of mid-to-low grade material. Downstream, jewelry dominates consumption, with high-end custom and collectible opals flowing primarily to Europe, the Middle East, and North America, while Asian markets, notably China, absorb larger volumes of commercial-grade opal cabochons and set pieces.

Ethiopian opal, with its vivid play-of-color and lower price, has captured significant mid-to-low market share in recent years, directly competing with Australian white opal. Incremental demand is driven by growing consumer interest in colored gemstones among younger generations, amplified by live-streaming e-commerce and social media showcasing opal's unique optical effects. On the supply side, Australian core mining districts face rising costs due to deeper workings, labor shortages, and stricter environmental regulations; exploration and new mine development take years. Mexican fire opal production is in long-term decline, while Ethiopian mining suffers from political instability and widespread artisanal operations.

Lab-grown opal technology matures rapidly and has become a clear substitute in lower-end decorative applications. Key uncertainties include potential changes in Australian government export controls and origin certification schemes, the impact of Ethiopian political and economic conditions on its opal sector, and increasing consumer focus on traceability and sustainable mining, which may reshape sourcing chains.

In summary, the natural opal rough market will exhibit a K-shaped polarization: premium black and fine fire opal will see stable price appreciation due to supply rigidity, while mid-to-low white opal and common Ethiopian material will face dual pressure from synthetic alternatives and emerging African supply. Small-scale miners will experience growing financial stress, driving industry consolidation and a shift toward branded, vertically integrated operations as a long-term trend.

This report studies the global Opal Rough production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Opal Rough and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Opal Rough that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Opal Rough total production and demand, 2021-2032, (kg)

Global Opal Rough total production value, 2021-2032, (USD Million)

Global Opal Rough production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Opal Rough consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Opal Rough domestic production, consumption, key domestic manufacturers and share

Global Opal Rough production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Opal Rough production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Opal Rough production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Opal Rough market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Australian Opal Company, Opal Corporation (Opalcorp), Cody Opal Australia, Broken River Mining, Clifton Opal, Australian Boulder Opals, Opalios, Absolute Opals & Gems, Opal Horizon, Fortune Opal Mining, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Opal Rough market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Opal Rough Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Opal Rough Market, Segmentation by Type:

Black Opal (Lightning Ridge)

White / Light Opal (Cooper Pedy)

Boulder Opal (Queensland)

Fire Opal (Mexico)

Ethiopian Opal (Welo)

#### Global Opal Rough Market, Segmentation by Grade:

Extra Fine / Gem Grade

Fine Grade

Commercial Grade

Industrial / Rough Craft Grade

## Global Opal Rough Market, Segmentation by Application:

High?end Jewelry

Commercial Jewelry

Carvings & Art Objects

Inlay & Mosaic

Specimen / Collector Market

Industrial (Abrasives)

## Companies Profiled:

Australian Opal Company

Opal Corporation (Opalcorp)

Cody Opal Australia

Broken River Mining

Clifton Opal

Australian Boulder Opals

Opalios

Absolute Opals & Gems

Opal Horizon

Fortune Opal Mining

Unearthed Australian Opal

Global Opals

Mintabie Opals Australia

Opaline Australia

Boulder Opal Enterprises

South Australian Opal Traders

Flood Gem

Seda Opals

Opals of Australia International

Opal Essence Australia

Lightning Ridge Opal Mines

P Tishler Opal Mining

S & L Opal Mining

Tom's Working Opal Mine

Russell's Opal Mine

Emil Weis Opals

A&S Opals

MAR Gemstone Exporters

Key Questions Answered:

1. How big is the global Opal Rough market?

2. What is the demand of the global Opal Rough market?
3. What is the year over year growth of the global Opal Rough market?
4. What is the production and production value of the global Opal Rough market?
5. Who are the key producers in the global Opal Rough market?
6. What are the growth factors driving the market demand?

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