

# Global Opal Rough Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Opal Rough market size was valued at US\$ 221 million in 2025 and is forecast to a readjusted size of US\$ 270 million by 2032 with a CAGR of 2.4% during review period.

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 Querétaro 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 is a detailed and comprehensive analysis for global Opal Rough market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global Opal Rough market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Opal Rough market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Opal Rough market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Opal Rough market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

## The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Opal Rough

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Opal Rough market based on the following parameters - company overview, sales quantity, revenue, 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.

## Market Segmentation

Opal Rough market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

Black Opal (Lightning Ridge)

White / Light Opal (Coober Pedy)

Boulder Opal (Queensland)

Fire Opal (Mexico)

Ethiopian Opal (Welo)

#### Market segment by Grade

Extra Fine / Gem Grade

Fine Grade

Commercial Grade

Industrial / Rough Craft Grade

#### Market segment by Application

High?end Jewelry

Commercial Jewelry

Carvings & Art Objects

Inlay & Mosaic

Specimen / Collector Market

Industrial (Abrasives)

#### Major players covered

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

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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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Opal Rough product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Opal Rough, with price, sales quantity, revenue, and global market share of Opal Rough from 2021 to 2026.

Chapter 3, the Opal Rough competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Opal Rough breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Opal Rough market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Opal Rough.

Chapter 14 and 15, to describe Opal Rough sales channel, distributors, customers, research findings and conclusion.

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