

Manganese Mining Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Manganese Mining Market Summary

Introduction

Manganese mining supports a critical industry supplying manganese ore primarily for steel production and chemical applications, with global output dropping to 18.8 million tons in 2024 (-9%), reflecting sharp declines in Australia (-64% due to Cyclone Megan) and Gabon (-11% after Moanda's Q4 shutdown), partially offset by South Africa's 13% rise in semi-carbonate ore. Global resources are substantial, concentrated in South Africa, Australia, and Gabon, with South Africa accounting for nearly 50% of 2024 seaborne supply. The industry is driven by its indispensable role in carbon steel, with 2024 global output at 1.883 billion tons (-1%), and faces supply volatility from weather and operational disruptions.

Market Size and Growth Forecast

The manganese mining market is anticipated to reach USD 17-20 billion by 2025, with a CAGR of 0.5%-1.5% through 2030, driven by steady steel production needs and limited supply expansion.

Regional Analysis

Africa, led by South Africa, expects growth of 0.5%-1.5%, bolstered by its dominant seaborne supply role, with trends showing resilience despite global declines. Oceania, primarily Australia, anticipates growth of 0.2%-1%, recovering from 2024's cyclone

impact, with a focus on export recovery. Asia Pacific projects growth of 0.5%-1.5%, with China's steel demand driving imports, though domestic mining is limited. Gabon expects growth of 0.2%-1%, constrained by operational setbacks.

Application Analysis

Metallurgy: Projected at 0.5%-1.5%, this dominates due to steel production, with trends toward higher-grade ores for efficiency.

Chemicals: Expected at 0.2%-1%, used in fertilizers and batteries, with slow growth tied to niche applications.

Key Market Players

South32: An Australian firm, South32 leads in manganese mining globally.

Consolidated Minerals: A major player, it focuses on manganese in Australia and Ghana.

Anglo American: A UK-based firm, it integrates manganese with its metals portfolio.

South Manganese Group: A Chinese company, it targets domestic steel needs.

ERAMET: A French firm, ERAMET excels in manganese mining in Gabon.

Vale: A Brazilian giant, Vale supplies manganese regionally.

African Rainbow Minerals: A South African firm, it leverages rich deposits.

Jupiter Mines: An Australian company, it focuses on manganese exports.

Kudumane Manganese Resources: A South African player, it supports local supply.

Western Region Gold: A Chinese firm, it explores manganese opportunities.

Ningxia Tianyuan Manganese: A Chinese leader, it dominates regional production.

Porter's Five Forces Analysis

Threat of New Entrants: Low. High capital and resource concentration deter entry.

Threat of Substitutes: Low. Manganese's steel role lacks direct alternatives.

Bargaining Power of Buyers: Moderate. Steel makers have leverage, balanced by supply limits.

Bargaining Power of Suppliers: High. Few producers control output.

Competitive Rivalry: Moderate. Key players compete on volume and quality.

Market Opportunities and Challenges

Opportunities

Steel Demand: Stable carbon steel production sustains need.

Battery Growth: Manganese's role in batteries offers potential.

Emerging Markets: Africa holds untapped reserves.

Supply Recovery: Post-2024 rebound opportunities exist.

Efficiency Gains: Technological advances boost yields.

Challenges

Supply Volatility: Weather and shutdowns disrupt output.

Environmental Regulations: Stricter rules raise costs.

Ore Grade Decline: Lower quality impacts profitability.

Economic Sensitivity: Steel cycles affect demand.

Capital Constraints: Limited investment slows growth.

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