

# **Andalusite Market Forecasts to 2034 – Global Analysis By Product Type (Raw Andalusite, Calcined Andalusite, Ground Andalusite, Andalusite Powder, High-purity Andalusite, and Other Product Types), Grade, Form, Distribution Channel, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Andalusite Market is accounted for \$420 million in 2026 and is expected to reach \$680 million by 2034, growing at a CAGR of 6.2% during the forecast period. Andalusite is a naturally occurring aluminosilicate mineral with the chemical composition  $Al_2SiO_5$ , belonging to the same polymorphic series as kyanite and sillimanite. When calcined at high temperatures, andalusite converts to mullite, an exceptionally stable refractory mineral phase that imparts outstanding thermal shock resistance, volume stability, and refractoriness under load to refractory products. Available in raw, calcined, ground, and powder forms, andalusite is processed into refractory bricks, castables, kiln furniture, and specialty ceramic products that withstand extreme thermal cycling and chemical attack.

### **Market Dynamics:**

Driver:

Robust demand from global iron and steel refractory applications

The iron and steel industry accounts for the dominant share of andalusite consumption, utilizing it as a key constituent of high-alumina refractory products for blast furnaces, ladles, tundishes, and electric arc furnace linings that must withstand extreme thermal,

mechanical, and chemical conditions. Global steel capacity expansions in India, Southeast Asia, and the Middle East are creating incremental demand for high-quality andalusite-based refractories. The mineral's particular value in applications requiring thermal shock resistance makes it the preferred choice for steel casting and continuous casting applications where repeated thermal cycling is inherent. Ongoing steelmaker investment in productivity improvement and campaign life extension for critical refractory-lined equipment sustains consistent andalusite demand across the global steel value chain.

#### Restraint:

Geographic concentration of high-quality andalusite reserves and supply chain fragility

High-quality andalusite reserves suitable for refractory-grade production are geographically concentrated, with South Africa accounting for the majority of global production followed by France and China. This supply concentration creates inherent fragility in the global andalusite supply chain, exposing downstream refractory manufacturers and their customers to disruption risks from mining operations, export policy changes, or geopolitical developments affecting key producing nations. South African andalusite producers face logistical and infrastructure challenges that can affect production consistency. The limited number of commercially viable andalusite mining operations globally constrains supply expansion flexibility and creates pricing leverage for major producers, particularly during periods of elevated steel and refractory industry activity.

#### Opportunity:

Growing application in advanced ceramic and kiln furniture for electronics manufacturing

The expansion of electronics and semiconductor manufacturing is generating growing demand for high-purity andalusite-derived mullite kiln furniture and ceramic setters capable of withstanding the precise thermal cycling and contamination-sensitive environments required for electronic component firing. Andalusite's in-situ mullitization during firing produces a dimensional stability and chemical purity superior to many alternative refractory raw materials, making andalusite-based ceramics valuable for firing electronic substrates, capacitors, and advanced technical ceramics. The global semiconductor investment cycle, characterized by extensive new fab construction and capacity expansion, is indirectly driving demand for high-quality refractory and ceramic

materials along the electronics manufacturing supply chain.

Threat:

Substitution by kyanite, bauxite, and synthetic mullite in refractory applications

Andalusite faces competitive substitution pressure from alternative aluminosilicate raw materials including kyanite, sillimanite, synthetic mullite, and high-purity calcined bauxite that can serve overlapping refractory application requirements. Kyanite, available from significant deposits in the United States and India, is a direct mineralogical substitute offering similar mullitization behavior. Synthetic mullite produced through electric furnace processing of alumina and silica provides consistent chemistry and eliminates dependence on natural mineral supply but at higher cost.

Covid-19 Impact:

The COVID-19 pandemic created significant demand disruption for andalusite through its impact on the global steel, cement, and ceramics industries, which collectively represent the vast majority of andalusite consumption. Industrial production curtailments, deferred refractory relining campaigns, and capital expenditure freezes reduced andalusite procurement volumes substantially during 2020. Mining operations in South Africa were impacted by national lockdown restrictions that temporarily constrained production and exports. Post-pandemic industrial recovery, led by steel demand rebound tied to global infrastructure stimulus programs, generated strong demand recovery for andalusite-based refractories.

The Raw Andalusite segment is expected to be the largest during the forecast period

The raw andalusite segment is expected to account for the largest market share during the forecast period, reflecting the material's primary role as an industrial refractory raw material where refractory manufacturers process and calcine the mineral as part of their own production operations. Refractory producers typically procure raw andalusite directly from mining operations and conduct calcination in-house to control mullite conversion characteristics and optimize the product chemistry for their specific formulations.

The Calcined Andalusite segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Calcined Andalusite segment is predicted to witness the highest growth rate, driven by growing demand from refractory manufacturers and ceramics producers seeking value-added processed raw materials that reduce in-house processing requirements and provide more consistent chemistry and mullitization characteristics. The segment is also benefiting from expanding adoption by advanced ceramics manufacturers producing kiln furniture, technical substrates, and specialty refractory shapes who prefer to source pre-processed raw materials that integrate efficiently into their ceramic body formulations.

### **Region with largest share:**

During the forecast period, the Europe region is expected to hold the largest market share, driven by France's significant andalusite mining production, the region's well-developed refractory industry that is among the world's most technically advanced, and substantial demand from European steel, cement, and glass manufacturers that are among the highest-specification consumers of quality refractory materials. European refractory manufacturers utilize andalusite as a premium raw material in high-performance castables and shaped refractories that command premium pricing in global markets.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, underpinned by China's expansive and growing steel industry that represents the world's largest refractory market by volume, alongside rapidly expanding steel and cement production across India and Southeast Asia. Growing recognition of andalusite's superior thermal shock resistance characteristics among Chinese and Indian refractory manufacturers upgrading product quality to serve more demanding customer applications is driving progressive substitution of lower-quality raw materials.

### **Key players in the market**

Some of the key players in Andalusite Market include Imerys S.A., Andalucita S.A., LKAB Minerals AB, Andalusite Resources Pty Ltd, Samrec Pty Ltd, Damrec SAS, Rhino Minerals Pty Ltd, Kyanite Mining Corporation, RHI Magnesita N.V., Resco Products Inc., Vesuvius plc, Refratechnik Holding GmbH, Shijiazhuang Mining Imp & Exp Trade Co. Ltd., Xinjiang Xinrong Yilong Andalusite Co. Ltd., and Orient Abrasives Ltd.

### **Key Developments:**

In January 2026, Imerys S.A. announced the expansion of processing capacity at its andalusite operations in France, investing in advanced calcination and milling equipment to increase production of value-added calcined andalusite grades targeting the growing high-performance castable refractory and advanced ceramics markets. The expansion is designed to address increasing customer demand for consistently high-purity, pre-processed andalusite that reduces in-house processing requirements for refractory manufacturers.

In March 2026, LKAB Minerals AB entered into a long-term supply agreement with a major European refractory manufacturer to supply high-grade andalusite from its South African sourcing operations, providing the customer with security of supply and price stability for andalusite raw material integral to its premium castable refractory product lines serving the European steel industry. The agreement includes provisions for collaborative product development of next-generation andalusite-based castable formulations.

#### Product Types Covered:

- Raw Andalusite
- Calcined Andalusite
- Ground Andalusite
- Andalusite Powder
- High-purity Andalusite
- Other Product Types

#### Grades Covered:

- Metallurgical Grade
- Refractory Grade
- Ceramic Grade

## Industrial Grade

### Forms Covered:

Powder

Granules

Lumps

Bricks & Blocks

Processed Materials

### Distribution Channels Covered:

Direct Sales

Distributors & Traders

Online/Industrial Procurement Platforms

### Applications Covered:

Refractory Materials

Foundry Applications

Kiln Linings

Insulation Materials

Ceramics & Glass Manufacturing

Metallurgical Processing

Cement Production

Investment Casting

End Users Covered:

Iron & Steel

Foundry

Cement

Glass

Ceramics

Non-ferrous Metals

Petrochemical

Power Generation

Mining & Mineral Processing

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

**Company Profiling**

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

**Regional Segmentation**

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

**Competitive Benchmarking**

Benchmarking of key players based on product portfolio, geographical

presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL ANDALUSITE MARKET, BY PRODUCT TYPE**

- 5.1 Raw Andalusite
- 5.2 Calcined Andalusite
- 5.3 Ground Andalusite
- 5.4 Andalusite Powder
- 5.5 High-purity Andalusite
- 5.6 Other Product Types

## **6 GLOBAL ANDALUSITE MARKET, BY GRADE**

- 6.1 Metallurgical Grade
- 6.2 Refractory Grade
- 6.3 Ceramic Grade
- 6.4 Industrial Grade

## **7 GLOBAL ANDALUSITE MARKET, BY FORM**

- 7.1 Powder
- 7.2 Granules
- 7.3 Lumps
- 7.4 Bricks & Blocks
- 7.5 Processed Materials

## **8 GLOBAL ANDALUSITE MARKET, BY DISTRIBUTION CHANNEL**

- 8.1 Direct Sales
- 8.2 Distributors & Traders
- 8.3 Online/Industrial Procurement Platforms

## **9 GLOBAL ANDALUSITE MARKET, BY APPLICATION**

- 9.1 Refractory Materials
- 9.2 Foundry Applications
- 9.3 Kiln Linings

- 9.4 Insulation Materials
- 9.5 Ceramics & Glass Manufacturing
- 9.6 Metallurgical Processing
- 9.7 Cement Production
- 9.8 Investment Casting

## **10 GLOBAL ANDALUSITE MARKET, BY END USER**

- 10.1 Iron & Steel
- 10.2 Foundry
- 10.3 Cement
- 10.4 Glass
- 10.5 Ceramics
- 10.6 Non-ferrous Metals
- 10.7 Petrochemical
- 10.8 Power Generation
- 10.9 Mining & Mineral Processing

## **11 GLOBAL ANDALUSITE MARKET, BY GEOGRAPHY**

- 11.1 North America
  - 11.1.1 United States
  - 11.1.2 Canada
  - 11.1.3 Mexico
- 11.2 Europe
  - 11.2.1 United Kingdom
  - 11.2.2 Germany
  - 11.2.3 France
  - 11.2.4 Italy
  - 11.2.5 Spain
  - 11.2.6 Netherlands
  - 11.2.7 Belgium
  - 11.2.8 Sweden
  - 11.2.9 Switzerland
  - 11.2.10 Poland
  - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
  - 11.3.1 China
  - 11.3.2 Japan

- 11.3.3 India
- 11.3.4 South Korea
- 11.3.5 Australia
- 11.3.6 Indonesia
- 11.3.7 Thailand
- 11.3.8 Malaysia
- 11.3.9 Singapore
- 11.3.10 Vietnam
- 11.3.11 Rest of Asia Pacific
- 11.4 South America
  - 11.4.1 Brazil
  - 11.4.2 Argentina
  - 11.4.3 Colombia
  - 11.4.4 Chile
  - 11.4.5 Peru
  - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
  - 11.5.1 Middle East
    - 11.5.1.1 Saudi Arabia
    - 11.5.1.2 United Arab Emirates
    - 11.5.1.3 Qatar
    - 11.5.1.4 Israel
    - 11.5.1.5 Rest of Middle East
  - 11.5.2 Africa
    - 11.5.2.1 South Africa
    - 11.5.2.2 Egypt
    - 11.5.2.3 Morocco
    - 11.5.2.4 Rest of Africa

## **12 STRATEGIC MARKET INTELLIGENCE**

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

## **13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 13.1 Mergers and Acquisitions

- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

## **14 COMPANY PROFILES**

- 14.1 Imerys S.A.
- 14.2 Andalucita S.A.
- 14.3 LKAB Minerals AB
- 14.4 Andalusite Resources Pty Ltd
- 14.5 Samrec Pty Ltd
- 14.6 Damrec SAS
- 14.7 Rhino Minerals Pty Ltd
- 14.8 Kyanite Mining Corporation
- 14.9 RHI Magnesita N.V.
- 14.10 Resco Products Inc.
- 14.11 Vesuvius plc
- 14.12 Refratechnik Holding GmbH
- 14.13 Shijiazhuang Mining Imp & Exp Trade Co., Ltd.
- 14.14 Xinjiang Xinrong Yilong Andalusite Co., Ltd.
- 14.15 Orient Abrasives Ltd.

## List Of Tables

### LIST OF TABLES

- Table 1 Global Andalusite Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Andalusite Market Outlook, By Product Type (2023-2034) (\$MN)
- Table 3 Global Andalusite Market Outlook, By Raw Andalusite (2023-2034) (\$MN)
- Table 4 Global Andalusite Market Outlook, By Calcined Andalusite (2023-2034) (\$MN)
- Table 5 Global Andalusite Market Outlook, By Ground Andalusite (2023-2034) (\$MN)
- Table 6 Global Andalusite Market Outlook, By Andalusite Powder (2023-2034) (\$MN)
- Table 7 Global Andalusite Market Outlook, By High-purity Andalusite (2023-2034) (\$MN)
- Table 8 Global Andalusite Market Outlook, By Other Product Types (2023-2034) (\$MN)
- Table 9 Global Andalusite Market Outlook, By Grade (2023-2034) (\$MN)
- Table 10 Global Andalusite Market Outlook, By Metallurgical Grade (2023-2034) (\$MN)
- Table 11 Global Andalusite Market Outlook, By Refractory Grade (2023-2034) (\$MN)
- Table 12 Global Andalusite Market Outlook, By Ceramic Grade (2023-2034) (\$MN)
- Table 13 Global Andalusite Market Outlook, By Industrial Grade (2023-2034) (\$MN)
- Table 14 Global Andalusite Market Outlook, By Form (2023-2034) (\$MN)
- Table 15 Global Andalusite Market Outlook, By Powder (2023-2034) (\$MN)
- Table 16 Global Andalusite Market Outlook, By Granules (2023-2034) (\$MN)
- Table 17 Global Andalusite Market Outlook, By Lumps (2023-2034) (\$MN)
- Table 18 Global Andalusite Market Outlook, By Bricks & Blocks (2023-2034) (\$MN)
- Table 19 Global Andalusite Market Outlook, By Processed Materials (2023-2034) (\$MN)
- Table 20 Global Andalusite Market Outlook, By Distribution Channel (2023-2034) (\$MN)
- Table 21 Global Andalusite Market Outlook, By Direct Sales (2023-2034) (\$MN)
- Table 22 Global Andalusite Market Outlook, By Distributors & Traders (2023-2034) (\$MN)
- Table 23 Global Andalusite Market Outlook, By Online/Industrial Procurement Platforms (2023-2034) (\$MN)
- Table 24 Global Andalusite Market Outlook, By Application (2023-2034) (\$MN)
- Table 25 Global Andalusite Market Outlook, By Refractory Materials (2023-2034) (\$MN)
- Table 26 Global Andalusite Market Outlook, By Foundry Applications (2023-2034) (\$MN)
- Table 27 Global Andalusite Market Outlook, By Kiln Linings (2023-2034) (\$MN)
- Table 28 Global Andalusite Market Outlook, By Insulation Materials (2023-2034) (\$MN)
- Table 29 Global Andalusite Market Outlook, By Ceramics & Glass Manufacturing (2023-2034) (\$MN)
- Table 30 Global Andalusite Market Outlook, By Metallurgical Processing (2023-2034)

(\$MN)

Table 31 Global Andalusite Market Outlook, By Cement Production (2023-2034) (\$MN)

Table 32 Global Andalusite Market Outlook, By Investment Casting (2023-2034) (\$MN)

Table 33 Global Andalusite Market Outlook, By End User (2023-2034) (\$MN)

Table 34 Global Andalusite Market Outlook, By Iron & Steel (2023-2034) (\$MN)

Table 35 Global Andalusite Market Outlook, By Foundry (2023-2034) (\$MN)

Table 36 Global Andalusite Market Outlook, By Cement (2023-2034) (\$MN)

Table 37 Global Andalusite Market Outlook, By Glass (2023-2034) (\$MN)

Table 38 Global Andalusite Market Outlook, By Ceramics (2023-2034) (\$MN)

Table 39 Global Andalusite Market Outlook, By Non-ferrous Metals (2023-2034) (\$MN)

Table 40 Global Andalusite Market Outlook, By Petrochemical (2023-2034) (\$MN)

Table 41 Global Andalusite Market Outlook, By Power Generation (2023-2034) (\$MN)

Table 42 Global Andalusite Market Outlook, By Mining & Mineral Processing  
(2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

## I would like to order

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