

Industrial Abrasives - A Global Market Overview

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Report description:

Global Industrial Abrasives Market Trends and Outlook

Industrial Abrasives are hard materials that are employed to shape, finish or polish other materials via processes, such as cutting, drilling, finishing, grinding, lapping, polishing or sanding. They can also be used for removing material from a workpiece through friction because of being harder than the workpiece. Industrial abrasives are extremely hard substances, which can be either Natural (e.g., diamonds, emery, garnets) or Synthetic (e.g., aluminum oxide, cubic boron nitride, silicon carbide), available in a variety of types, including Bonded Industrial Abrasives (e.g., grinding wheels) Coated Industrial Abrasives (e.g., sandpapers, belts) and Super Industrial Abrasives (e.g., diamond or cubic boron nitride tools). These materials play a vital role in a number of end-use sectors, such as Aerospace & Defense, Automotive & Transportation, Building & Construction, Cleaning & Maintenance, Electrical & Electronics, Heavy Machinery and Metal Fabrication, among others. The term "abrasive" is derived from the Latin word "abradere," meaning "to scrape off," which accurately describes their function.

Global market for Industrial Abrasives is expected to maintain a CAGR of 5.3% between 2024 and 2030 and reach a projected US\$67 billion by 2030 from an estimated US\$49.2 billion in 2024. Demand for Industrial Abrasives is driven by major industries like automotive, manufacturing, and construction, where they are essential for precision grinding, cutting, and finishing. Metal fabrication, including the production of pre-engineered buildings and components, relies heavily on these abrasives. Rapid industrialization in emerging markets like China and India has further boosted demand, especially in metalworking, electronics, and infrastructure. Technological advancements-such as super abrasives, advanced coatings, and automation-ready products-are enhancing efficiency and performance. Automation and robotics in manufacturing also require specialized abrasives. Additionally, the rise in vehicle production, especially EVs, and the precision needed in aerospace and electronics manufacturing are fueling further growth.

Industrial Abrasives Regional Market Analysis

With an estimated share of 46.4% in 2024, Asia-Pacific represents the leading global market for Industrial Abrasives, which is also likely to log the fastest CAGR of 6.7 between 2024 and 2030. Rapid industrialization in China, India and Southeast Asian nations, especially in manufacturing, automotive and metal fabrication sectors that rely heavily on Industrial Abrasives for grinding, cutting

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and polishing is one of the major reasons driving the region's growth. Huge investments in infrastructure projects, such as transportation networks, energy facilities and urban development are further boosting demand for abrasives in construction applications, such as surface preparation and material finishing.

Industrial Abrasives Market Analysis by Raw Material

By raw material, the worldwide demand for Synthetic Abrasives is larger at a 2024 estimated share of 83.4% and is also expected to post a faster CAGR of 5.6% over 2024-2030. Compared to Natural Abrasives, Synthetic Abrasives, such as aluminum oxide, silicon carbide, synthetic diamond and cubic boron nitride (CBN) provide higher hardness, durability and consistent quality, making them ideal for high-precision applications in sectors, such as automotive, aerospace and electronics. Synthetic material-based coated abrasives offer flexibility, efficiency, and precise surface finishes, which further propels growth in various industries. The production of Synthetic Abrasives is undergoing innovations, such as advanced bonding techniques, nanotechnology and customized grain structures, thereby improving performance and minimizing material waste.

Industrial Abrasives Market Analysis by Type

The global market for Bonded Industrial Abrasives is the largest, estimated to account for a share of 44.7% in 2024. The dominance of this abrasive type can be attributed to its widespread use in high-precision and rough grinding applications across the automotive, aerospace, metal fabrication and construction industries. On the other hand, the demand for Coated Industrial Abrasives is anticipated to register the fastest CAGR of 5.6% during the 2024-2030 analysis period, key products of which comprise sandpaper, abrasive belts, discs, sheets and rolls, with backing materials like paper, cloth or polyester coated with abrasive grains of aluminum oxide, silicon carbide or zirconia alumina.

Industrial Abrasives Market Analysis by Application

Among the various applications where Industrial Abrasives are used, Grinding is the largest, with an estimated 2024 share of 38.9%, the major reasons for which are its versatility and high demand for precision in industrial production. Grinding finds extensive use in metalworking, automotive (engine components & gears), aerospace (turbine blades) and machinery manufacturing and involves material removal with abrasive wheels, belts or discs for achieving precise dimensions and surface quality. However, the fastest growing application for Industrial Abrasives is Polishing, forecast to maintain a compounded annual rate of 6.2% between 2024 and 2030. Diamond slurries, cerium oxide and nano-abrasives are widely used for chemical-mechanical polishing (CMP) to achieve ultra-smooth surfaces in fast-growing high-tech industries, such as semiconductors (wafer polishing), optics (lenses & mirrors) and medical devices (implants & surgical tools). Further growth is being fueled by a shift towards miniaturization and precision in the electronics and aerospace sectors and a growing demand for polishing advanced materials, such as sapphire, ceramics and composites.

Industrial Abrasives Market Analysis by End-Use Sector

Automotive & Transportation constitutes the largest end-use sector for Industrial Abrasives, capturing 33.5% of the global market estimated in 2024. Abrasives find application in making auto parts, surface preparation, grinding, polishing and maintenance (e.g., brake rotor resurfacing, body finishing), and are vital to achieve high-quality surface finishes and precision in components, such as brakes, flywheels and axles. Factors responsible for this sector's leading position in the Industrial Abrasives market include growth in vehicle production, particularly electric vehicles (EVs) that require specialized abrasive tools for unique components. Innovations in abrasive materials (e.g., coated abrasives) are enhancing efficiency and performance in automotive applications. With regard to growth, though, the global demand for Industrial Abrasives in the Electrical & Electronics sector will likely post the fastest 2024-2030 compounded annual rate of 6.9%. Abrasives are critical in the electronics industry for precision grinding, polishing and finishing of components, such as semiconductors, printed circuit boards (PCBs), wafers and microchips.

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Industrial Abrasives Market Report Scope

This global report on Industrial Abrasives analyzes the market based on raw material, type, application and end-use sector for the period 2021-2030 with projections from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 40+

Industrial Abrasives Market by Geographic Region

- North America (United States, Canada and Mexico)
- Europe (France, Germany, Italy, Russia, Spain, United Kingdom and Rest of Europe)
- Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)
- South America (Argentina, Brazil and Rest of Latin America)
- Middle East & Africa

Industrial Abrasives Market by Raw Material

- Natural
- Synthetic

Industrial Abrasives Market by Type

- Bonded Industrial Abrasives
- Coated Industrial Abrasives
- Super Industrial Abrasives

Industrial Abrasives Market by Application

- Cutting
- Drilling
- Finishing
- Grinding
- Polishing
- Other Applications (incl. Lapping & Sanding)

Industrial Abrasives Market by End-Use Sector

- Aerospace & Defense
- Automotive & Transportation
- Building & Construction
- Cleaning & Maintenance
- Electrical & Electronics
- Heavy Machinery
- Metal Fabrication
- Other End-Use Sectors (incl. Consumer Goods, Medical Devices and Woodworking)

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Table of Contents:

PART A: GLOBAL MARKET PERSPECTIVE

1. Introduction

- Product Outline
- Industrial Abrasives Defined
- Industrial Abrasives Raw Materials
 - o□Natural
 - o□Synthetic
- Types of Industrial Abrasives
 - o□Bonded Industrial Abrasives
 - o□Coated Industrial Abrasives
 - o□Super Industrial Abrasives
- Industrial Abrasives Applications
 - o□Cutting
 - o□Drilling
 - o□Finishing
 - o□Grinding
 - o□Polishing
 - o□Other Applications
- Industrial Abrasives Usage in End-Use Sectors
 - o□Aerospace & Defense
 - o□Automotive & Transportation
 - o□Building & Construction
 - o□Cleaning & Maintenance
 - o□Electrical & Electronics
 - o□Heavy Machinery
 - o□Metal Fabrication
 - o□Other End-Use Sectors (Incl. Consumer Goods, Medical Devices and Woodworking)

2. Key Market Trends

3. Key Market Players

- 3M Co
- Abrasiveflex Pty Ltd
- Action SuperAbrasive
- ARC Abrasives, Inc.
- Asahi Diamond Industrial Co Ltd
- Bullard Abrasives, Inc.
- Carborundum Universal Ltd
- Deerfos Co. Ltd
- Dronco GmbH
- Ehwa Diamond Industrial Co Ltd
- Flexovit Abrasives
- Fujimi Incorporated
- Grinding Techniques (Pty) Ltd
- Grindwell Norton Ltd
- Grupo Cosentino SL (Cosentino SA)
- Henan Huanghe Whirlwind Co Ltd
- Henkel AG & Co KGaA

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- []Hermes Schleifmittel GmbH & Co KG
- []Hindustan Abrasives
- []Jason Incorporated
- []Klingspor AG
- []Krebs & Reidel Schleifscheibenfabrik GmbH & Co KG
- []Mirka Ltd
- []Nihon Kenshi Co Ltd
- []Nippon Resibon Corp
- []Noritake Co Ltd
- []Norton Abrasives
- []Osborn Lippert India Pvt Ltd
- []Pferd, Inc.
- []Radiac Abrasives, Inc.
- []Robert Bosch GmbH
- []Saint-Gobain Abrasives, Inc.
- []Sait Abrasivi SpA
- []SAK Abrasives Ltd
- []Sankyo-Rikagaku Co Ltd
- []Schaffner Manufacturing Company, Inc.
- []sia Abrasives Industries AG
- []Sterling Abrasives Ltd
- []Tyrolit-Schleifmittelwerke Swarovski AG & Co KG
- []Vereinigte Schmirgel-und Maschinen-Fabriken AG (VSM AG)
- []Walter Surface Technologies
- []Washington Mills
- []Wendt (India) Ltd

4. Key Business & Product Trends

5. Global Market Overview

- []Global Industrial Abrasives Market Overview by Raw Material
 - o []Industrial Abrasives Raw Material Market Overview by Global Region
- []Natural
- []Synthetic
- []Global Industrial Abrasives Market Overview by Type
 - o []Industrial Abrasives Type Market Overview by Global Region
- []Bonded Industrial Abrasives
- []Coated Industrial Abrasives
- []Super Industrial Abrasives
- []Global Industrial Abrasives Market by Application
 - o []Industrial Abrasives Application Market Overview by Global Region
- []Cutting
- []Drilling
- []Finishing
- []Grinding
- []Polishing
- []Other Applications
- []Global Industrial Abrasives Market by End-Use Sector
 - o []Industrial Abrasives End-use Sector Market Overview by Global Region

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- Aerospace & Defense
- Automotive & Transportation
- Building & Construction
- Cleaning & Maintenance
- Electrical & Electronics
- Heavy Machinery
- Metal Fabrication
- Other End-Use Sectors

PART B: REGIONAL MARKET PERSPECTIVE

- Global Industrial Abrasives Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. North America

- North American Industrial Abrasives Market Overview by Geographic Region
- North American Industrial Abrasives Market Overview by Raw Material
- North American Industrial Abrasives Market Overview by Type
- North American Industrial Abrasives Market Overview by Application
- North American Industrial Abrasives Market Overview by End-Use Sector
- Country-wise Analysis of North American Industrial Abrasives Market
 - o□The United States
 - United States Industrial Abrasives Market Overview by Raw Material
 - United States Industrial Abrasives Market Overview by Type
 - United States Industrial Abrasives Market Overview by Application
 - United States Industrial Abrasives Market Overview by End-Use Sector
 - o□Canada
 - Canadian Industrial Abrasives Market Overview by Raw Material
 - Canadian Industrial Abrasives Market Overview by Type
 - Canadian Industrial Abrasives Market Overview by Application
 - Canadian Industrial Abrasives Market Overview by End-Use Sector
 - o□Mexico
 - Mexican Industrial Abrasives Market Overview by Raw Material
 - Mexican Industrial Abrasives Market Overview by Type
 - Mexican Industrial Abrasives Market Overview by Application
 - Mexican Industrial Abrasives Market Overview by End-Use Sector

7. Europe

- European Industrial Abrasives Market Overview by Geographic Region
- European Industrial Abrasives Market Overview by Raw Material
- European Industrial Abrasives Market Overview by Type
- European Industrial Abrasives Market Overview by Application
- European Industrial Abrasives Market Overview by End-Use Sector
- Country-wise Analysis of European Industrial Abrasives Market
 - o□France
 - French Industrial Abrasives Market Overview by Raw Material
 - French Industrial Abrasives Market Overview by Type
 - French Industrial Abrasives Market Overview by Application
 - French Industrial Abrasives Market Overview by End-Use Sector
 - o□Germany
 - German Industrial Abrasives Market Overview by Raw Material

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- [] German Industrial Abrasives Market Overview by Type
- [] German Industrial Abrasives Market Overview by Application
- [] German Industrial Abrasives Market Overview by End-Use Sector
- o [] Italy
- [] Italian Industrial Abrasives Market Overview by Raw Material
- [] Italian Industrial Abrasives Market Overview by Type
- [] Italian Industrial Abrasives Market Overview by Application
- [] Italian Industrial Abrasives Market Overview by End-Use Sector
- o [] Russia
- [] Russian Industrial Abrasives Market Overview by Raw Material
- [] Russian Industrial Abrasives Market Overview by Type
- [] Russian Industrial Abrasives Market Overview by Application
- [] Russian Industrial Abrasives Market Overview by End-Use Sector
- o [] Spain
- [] Spanish Industrial Abrasives Market Overview by Raw Material
- [] Spanish Industrial Abrasives Market Overview by Type
- [] Spanish Industrial Abrasives Market Overview by Application
- [] Spanish Industrial Abrasives Market Overview by End-Use Sector
- o [] United Kingdom
- [] United Kingdom Industrial Abrasives Market Overview by Raw Material
- [] United Kingdom Industrial Abrasives Market Overview by Type
- [] United Kingdom Industrial Abrasives Market Overview by Application
- [] United Kingdom Industrial Abrasives Market Overview by End-Use Sector
- o [] Rest of Europe
- [] Rest of Europe Industrial Abrasives Market Overview by Raw Material
- [] Rest of Europe Industrial Abrasives Market Overview by Type
- [] Rest of Europe Industrial Abrasives Market Overview by Application
- [] Rest of Europe Industrial Abrasives Market Overview by End-Use Sector
- 8. Asia-Pacific
- [] Asia-Pacific Industrial Abrasives Market Overview by Geographic Region
- [] Asia-Pacific Industrial Abrasives Market Overview by Raw Material
- [] Asia-Pacific Industrial Abrasives Market Overview by Type
- [] Asia-Pacific Industrial Abrasives Market Overview by Application
- [] Asia-Pacific Industrial Abrasives Market Overview by End-Use Sector
- [] Country-wise Analysis of Asia-Pacific Industrial Abrasives Market
- o [] China
- [] Chinese Industrial Abrasives Market Overview by Raw Material
- [] Chinese Industrial Abrasives Market Overview by Type
- [] Chinese Industrial Abrasives Market Overview by Application
- [] Chinese Industrial Abrasives Market Overview by End-Use Sector
- o [] India
- [] Indian Industrial Abrasives Market Overview by Raw Material
- [] Indian Industrial Abrasives Market Overview by Type
- [] Indian Industrial Abrasives Market Overview by Application
- [] Indian Industrial Abrasives Market Overview by End-Use Sector
- o [] Japan
- [] Japanese Industrial Abrasives Market Overview by Raw Material

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- [] Japanese Industrial Abrasives Market Overview by Type
- [] Japanese Industrial Abrasives Market Overview by Application
- [] Japanese Industrial Abrasives Market Overview by End-Use Sector
- o [] South Korea
 - [] South Korean Industrial Abrasives Market Overview by Raw Material
 - [] South Korean Industrial Abrasives Market Overview by Type
 - [] South Korean Industrial Abrasives Market Overview by Application
 - [] South Korean Industrial Abrasives Market Overview by End-Use Sector
- o [] Rest of Asia-Pacific
 - [] Rest of Asia-Pacific Industrial Abrasives Market Overview by Raw Material
 - [] Rest of Asia-Pacific Industrial Abrasives Market Overview by Type
 - [] Rest of Asia-Pacific Industrial Abrasives Market Overview by Application
 - [] Rest of Asia-Pacific Industrial Abrasives Market Overview by End-Use Sector

9. South America

- [] South American Industrial Abrasives Market Overview by Geographic Region
- [] South American Industrial Abrasives Market Overview by Raw Material
- [] South American Industrial Abrasives Market Overview by Type
- [] South American Industrial Abrasives Market Overview by Application
- [] South American Industrial Abrasives Market Overview by End-Use Sector
- [] Country-wise Analysis of South American Industrial Abrasives Market
- o [] Argentina
 - [] Argentine Industrial Abrasives Market Overview by Raw Material
 - [] Argentine Industrial Abrasives Market Overview by Type
 - [] Argentine Industrial Abrasives Market Overview by Application
 - [] Argentine Industrial Abrasives Market Overview by End-Use Sector
- o [] Brazil
 - [] Brazilian Industrial Abrasives Market Overview by Raw Material
 - [] Brazilian Industrial Abrasives Market Overview by Type
 - [] Brazilian Industrial Abrasives Market Overview by Application
 - [] Brazilian Industrial Abrasives Market Overview by End-Use Sector
- o [] Rest of South America
 - [] Rest of South American Industrial Abrasives Market Overview by Raw Material
 - [] Rest of South American Industrial Abrasives Market Overview by Type
 - [] Rest of South American Industrial Abrasives Market Overview by Application
 - [] Rest of South American Industrial Abrasives Market Overview by End-Use Sector

10. Middle East & Africa

- [] Middle East & Africa Industrial Abrasives Market Overview by Raw Material
- [] Middle East & Africa Industrial Abrasives Market Overview by Type
- [] Middle East & Africa Industrial Abrasives Market Overview by Application
- [] Middle East & Africa Industrial Abrasives Market Overview by End-Use Sector

PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

1. RESEARCH METHODOLOGY

2. FEEDBACK

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