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Global Arc Welding Rods Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Arc Welding Rods market size is expected to reach $ 3040 million by 2032, rising at a market growth of 3.0% CAGR during the forecast period (2026-2032).

Arc Welding Rods are consumable flux-coated welding electrodes primarily used in Shielded Metal Arc Welding, or SMAW. Each rod consists of a conductive metallic core and an external flux coating. During welding, the core melts to form the weld deposit, while the coating stabilizes the arc, generates shielding gases and slag, supports deoxidation and regulates weld-metal properties. Commercial Arc Welding Rods mainly cover carbon steel, low-alloy steel, stainless steel and other alloy systems, with specifications differentiated by electrode classification, diameter, welding position, mechanical performance and welding-current characteristics. They are widely used in construction and infrastructure, general manufacturing and maintenance, oil and gas and energy, shipbuilding and heavy fabrication, particularly in field welding, outdoor construction and repair operations requiring portable equipment and flexible operating conditions.

Key Findings

Global Arc Welding Rods shipments were approximately 2.19 million metric tons in 2025

Weighted manufacturer FOB price was approximately USD 1,090 per metric ton in 2025

Construction And Infrastructure accounted for approximately 36% of global

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shipment demand

Carbon Steel Electrodes remained the largest alloy-based product category

Market Trends

The Arc Welding Rods market is gradually shifting from predominantly commodity carbon steel products toward a more differentiated structure emphasizing weld reliability, mechanical properties and application-specific performance. Low-hydrogen, high-strength, stainless steel, heat-resistant and hardfacing products are gaining importance in demanding industrial applications, while product development increasingly focuses on stable arc characteristics, reduced spatter, easier slag removal, all-position operability and moisture resistance. At the same time, automated manufacturing continues to adopt solid wire, flux-cored wire and submerged arc welding for higher deposition efficiency, leaving Arc Welding Rods with particularly durable advantages in field fabrication, outdoor construction, maintenance and difficult-access welding.

Market Dynamics

Drivers

Infrastructure construction, structural steel fabrication, energy facilities, shipyards, heavy equipment and industrial maintenance continue to generate substantial field welding demand. SMAW equipment is portable and Arc Welding Rods provide their own flux-based shielding, supporting welding in outdoor and dispersed work environments. Recurring repair demand from industrial plants, mining equipment, power assets, vessels and steel structures also gives the market a stable consumables-based demand foundation.

Restraints

The main structural restraint is substitution by higher-productivity welding processes in standardized manufacturing. MIG/MAG, flux-cored and submerged arc welding offer continuous feeding, higher deposition efficiency and easier integration with mechanized or robotic production. Standard carbon steel Arc Welding Rods also face strong price

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competition because core wire, ferroalloys and coating materials account for a significant share of manufacturing cost while basic products provide limited differentiation.

Opportunities

Future opportunities are increasingly concentrated in higher-performance products, including low-hydrogen electrodes, high-strength low-alloy grades, stainless and corrosion-resistant products, heat-resistant electrodes and hardfacing rods. Infrastructure renewal, energy projects, marine engineering, pressure equipment and industrial maintenance are creating greater demand for products offering improved toughness, crack resistance, corrosion resistance and welding consistency.

Challenges

Higher-grade Arc Welding Rods require tighter control of flux formulation, diffusible hydrogen, raw-material consistency, drying and baking processes, moisture management and mechanical-property consistency. Manufacturers must also address differing AWS, JIS, EN and customer-specific qualification requirements while maintaining competitive pricing and regional product availability.

Industry Chain Analysis

The upstream industry includes steel wire rod and core wire, ferroalloys, iron powder, rutile and titanium-bearing materials, fluorspar, limestone, cellulose, silicate binders and alloying materials such as chromium, nickel and molybdenum. Midstream manufacturing covers wire drawing, straightening and cutting, flux formulation, extrusion coating, drying or baking, finishing, testing and moisture-controlled packaging. Standard carbon steel products depend heavily on procurement scale and manufacturing efficiency, while low-hydrogen and specialty alloy products rely more on formulation expertise, process stability and qualification capability.

Downstream distribution combines direct industrial sales with welding-material distributors and industrial supply channels. Commodity Arc Welding Rods compete primarily on price, availability and ease of use, while higher-value grades compete on mechanical performance, certification, technical support and application reliability.

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Segment Insights

Carbon Steel Electrodes account for the largest shipment share because of their broad use in structural fabrication, construction and maintenance. Low-Alloy Steel Electrodes serve more demanding high-strength and pressure-equipment applications, while Stainless Steel Electrodes command higher unit values because of alloy content and corrosion-resistance requirements. Nickel-based, cast-iron and specialized hardfacing products represent smaller volumes but significantly higher value per unit of weight. Electrode diameter and welding position provide additional commercially relevant segmentation by affecting current requirements, deposition performance, material thickness and operating flexibility.

Downstream Market Opportunities

Construction And Infrastructure accounts for approximately 36% of global Arc Welding Rods shipment demand. General Manufacturing And Maintenance represents approximately 28%, supported by recurring equipment fabrication and repair requirements. Oil, Gas And Energy accounts for approximately 21%, where pipelines, storage tanks, pressure vessels and power equipment require higher-performance electrodes. Shipbuilding And Heavy Fabrication represents approximately 15%, with Arc Welding Rods remaining important in repair, assembly and difficult-access welding.

Regional Insights

Asia-Pacific is the largest production and consumption region for Arc Welding Rods, supported by substantial manufacturing capacity in China, India, Japan and South Korea and broad demand from infrastructure, shipbuilding, fabrication and industrial maintenance. North America and Europe are more mature markets, where automation limits general-purpose volume growth but supports stable demand for maintenance and specialty products. India, Southeast Asia, the Middle East and parts of Africa continue to provide opportunities associated with infrastructure expansion, energy investment and field welding.

Competitive Landscape Analysis

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The global Arc Welding Rods market combines diversified international welding groups, large Asian consumables manufacturers and specialized regional suppliers. Lincoln Electric and ESAB compete through broad filler-metal portfolios and international distribution, while Kobe Steel, Nippon Steel Welding & Engineering, voestalpine Böhler Welding, Hyundai Welding and KISWEL maintain extensive offerings for demanding industrial welding applications. Chinese manufacturers including Tianjin Golden Bridge Welding Materials Group, Tianjin Bridge Welding Materials Group and Sichuan Atlantic Welding Materials combine scale production, broad product coverage and export capabilities. Specialized suppliers focus more heavily on hardfacing, maintenance and other higher-value niches. Competition in standard grades remains driven by cost, consistency and channel availability, while higher-performance products increasingly depend on qualification capability, alloy know-how and application engineering.

Report Scope

This report studies the global Arc Welding Rods production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Arc Welding Rods 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 Arc Welding Rods that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Arc Welding Rods total production and demand, 2021-2032, (Kilotons)

Global Arc Welding Rods total production value, 2021-2032, (USD Million)

Global Arc Welding Rods production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Arc Welding Rods consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Arc Welding Rods domestic production, consumption, key

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domestic manufacturers and share

Global Arc Welding Rods production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Arc Welding Rods production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Arc Welding Rods production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Arc Welding Rods 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 Lincoln Electric Holdings, Inc., ESAB Corporation, Hobart Brothers LLC, Kobe Steel, Ltd., Nippon Steel Welding & Engineering Co., Ltd., voestalpine Böhler Welding Group GmbH, Hyundai Welding Co., Ltd., KISWEL CO., LTD., Ador Welding Limited, D&H Sécheron Electrodes Pvt. Ltd., 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 Arc Welding Rods market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) 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 Arc Welding Rods Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Arc Welding Rods Market, Segmentation by Type:

Carbon Steel Electrodes

Low-Alloy Steel Electrodes

Stainless Steel Electrodes

Others

Global Arc Welding Rods Market, Segmentation by Electrode Diameter:

?2.5 mm

2.5–3.2 mm

3.2–4.0 mm

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?4.0 mm

Global Arc Welding Rods Market, Segmentation by AWS Strength Class:

E60XX Series

E70XX Series

E80XX and Higher Series

Others

Global Arc Welding Rods Market, Segmentation by Application:

Marine Industry

Automotive

Construction and Bridge Industry

Machinery Manufacturing Industry

Chemical Industry

Others

Companies Profiled:

Lincoln Electric Holdings, Inc.

ESAB Corporation

Hobart Brothers LLC

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Kobe Steel, Ltd.

Nippon Steel Welding & Engineering Co., Ltd.

voestalpine Böhler Welding Group GmbH

Hyundai Welding Co., Ltd.

KISWEL CO., LTD.

Ador Welding Limited

D&H Sécheron Electrodes Pvt. Ltd.

Eureka Electrodes and Wires Pvt. Ltd.

Welding Alloys Group

CORODUR Fülldraht GmbH

Castolin Eutectic GmbH

Vorarc Welding CC

African Oxygen Limited (Afrox)

Saffer Plumbing & Hardware (Promax Welding Division)

Tianjin Golden Bridge Welding Materials Group Co., Ltd.

Tianjin Bridge Welding Materials Group Co., Ltd.

Sichuan Atlantic Welding Materials Co., Ltd.

Kunshan Gintune Welding Co., Ltd.

Wuhan Temo Welding Consumables Co., Ltd.

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Shandong Juli Welding Materials Co., Ltd.

HIT Welding Industry Co., Ltd.

Key Questions Answered

1. How big is the global Arc Welding Rods market?
2. What is the demand of the global Arc Welding Rods market?
3. What is the year over year growth of the global Arc Welding Rods market?
4. What is the total value of the global Arc Welding Rods market?
5. Who are the Major Players in the global Arc Welding Rods market?
6. What are the growth factors driving the market demand?

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