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Global Die-Casting Die Steel Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Die-Casting Die Steel market size is expected to reach $ 3914 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of die-casting die steel reached 479,000 metric tons, with an average price of $5,364 per ton.

Die-casting die steel refers to high-performance tool steel used to manufacture die cavities, cores, and critical load-bearing components for the die-casting of non-ferrous metals such as aluminum, magnesium, and zinc alloys. These steels must operate over long periods under conditions of high temperature, high pressure, high-velocity molten metal impingement, and repeated thermal cycling; consequently, they require high-temperature strength, thermal fatigue resistance, wear resistance, toughness, resistance to heat checking, and good machinability.

Die-casting die steel is generally considered a key subset of hot-work tool steel, though the two categories are not identical. While hot-work tool steel is also used in applications such as hot forging, hot extrusion, and hot stamping, die-casting die steel specifically refers to steels suited for the die-casting processes of metals like aluminum, magnesium, zinc, and copper alloys. Typical materials include AISI H13, H11, DIN 1.2344, and 1.2343, as well as derivatives such as high-purity H13, ESR (Electroslag Remelting) steels, and high-performance proprietary grades like Dievar, DAC, DH31, and Thermodur.

The global market for die-casting die steel is transitioning from traditional H13-grade products toward high-quality H13, ESR (Electroslag Remelting) steels, and high-performance hot-work die steels. As a core material for high-pressure die-casting

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molds, market demand for this steel is closely tied to the performance of downstream sectors such as automotive, consumer electronics, and industrial machinery. The automotive industry is the largest application sector; specifically, the growth of new energy vehicles (NEVs), integrated die-casting, large-scale body structural components, and massive die-casting equipment is driving sustained demand for die steels characterized by high toughness, high thermal strength, superior thermal fatigue resistance, and high purity. By 2025, the automotive sector is projected to account for 66% of the global market by revenue. While traditional standard H13 remains the market mainstay, its revenue share is expected to decline gradually as the size of die-cast parts increases and mold longevity requirements rise; instead, modified/high-quality H13 and high-performance hot-work die steels will become the primary drivers of future market growth.

Regionally, China has emerged as one of the world's most important markets for both the production and consumption of die-casting die steel, with its share of global production steadily rising; by 2025, China is expected to account for 43% of production volume and 39% of sales volume. Europe, Japan, and North America retain significant advantages in high-end products, proprietary grades, and remelting technologies. Companies such as Voestalpine, Daido Steel, Proterial, Aubert & Duval, Swiss Steel Group, and Carpenter Technology possess strong competitive capabilities in high-quality ESR steels, large-scale blocks, proprietary high-performance grades, and technical services. Meanwhile, Chinese enterprises—including Fushun Special Steel, Tiangong International, Dongbei Special Steel, CITIC Special Steel, and Baosteel Special Steel—are accelerating their penetration into mid-to-high-end markets by enhancing steel purity, optimizing heat treatment properties, and developing ESR and large-block products, resulting in a clear trend toward domestic substitution. Future growth in the Chinese market will stem not only from an expansion in total demand but also from increases in average selling prices and unit value driven by the upgrading of the product mix. In terms of supply and demand, the growth rate of global effective capacity for die-casting mold steel has generally outpaced that of demand in recent years. Chinese enterprises, in particular, have continuously expanded their production capacity for high-quality tool and mold steels, while investment demand from the European automotive, industrial equipment, and mold sectors remained relatively weak during the 2023–2025 period, resulting in a temporary oversupply in the global market. Sales volumes are expected to remain flat at a high level throughout 2024 and 2025, whereas average selling prices have declined due to falling energy and raw material costs, intensified industry competition, and increased supply capabilities from China. Looking beyond 2025, global sales volume is projected to resume moderate growth as downstream inventory destocking concludes, large-scale die-casting projects for new

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energy vehicles (NEVs) advance, and demand for high-end mold steel rises; however, the industry is expected to maintain substantial capacity reserves.

Regarding product mix, H13 and its equivalent grades currently hold the largest market share, accounting for 42.32% of global revenue in 2025. The market for modified and high-quality H13 grades is poised to grow faster than the overall market, driven by the adoption of Electroslag Remelting (ESR), stringent cleanliness controls, and increasingly demanding mold service-life requirements. High-performance hot-work mold steel represents the segment with the greatest growth potential, particularly for applications involving large-scale integrated die-casting molds, high-temperature and high-pressure operating conditions, and requirements for high cycle life. Future market competition is expected to shift from traditional battles over price and capacity toward comprehensive competition based on factors such as material cleanliness, toughness, thermal fatigue resistance, uniformity in large cross-sections, remelting capabilities, heat treatment compatibility, and collaborative product development with customers.

Report Scope

This report studies the global Die-Casting Die Steel production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Die-Casting Die Steel 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 Die-Casting Die Steel that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Die-Casting Die Steel total production and demand, 2021-2032, (Kilotons)

Global Die-Casting Die Steel total production value, 2021-2032, (USD Million)

Global Die-Casting Die Steel production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

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Global Die-Casting Die Steel consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Die-Casting Die Steel domestic production, consumption, key domestic manufacturers and share

Global Die-Casting Die Steel production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Die-Casting Die Steel production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Die-Casting Die Steel production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Die-Casting Die Steel 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 Voestalpine, Daido Steel, Proterial, Aubert and Duval, Kind und Co., Sanyo Special Steel, Nippon Koshuha Steel, Swiss Steel Group, Carpenter Technology, Fushun Special Steel, 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 Die-Casting Die Steel 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.

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Global Die-Casting Die Steel Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Die-Casting Die Steel Market, Segmentation by Type:

H13 and Equivalent Steels

Modified and High-Quality H13

High-Performance Hot-Work Die Steels

Others

Global Die-Casting Die Steel Market, Segmentation by Product Forms:

Forged Blocks

Rolled Bars

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Plates

Pre-machined Blocks

Others

Global Die-Casting Die Steel Market, Segmentation by Die-Casting Materials:

Aluminum Die Casting

Magnesium Die Casting

Zinc Die Casting

Copper Alloy Die Casting

Others

Global Die-Casting Die Steel Market, Segmentation by Application:

Automotive

Consumer Electronics

Industrial Machinery and Equipment

Others

Companies Profiled:

Voestalpine

Daido Steel

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Proterial

Aubert and Duval

Kind und Co.

Sanyo Special Steel

Nippon Koshuha Steel

Swiss Steel Group

Carpenter Technology

Fushun Special Steel

Tiangong International

Dongbei Special Steel

Baosteel Special Steel

CITIC Special Steel

Jiangsu Yonggang

Key Questions Answered

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

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Contents

1 SUPPLY SUMMARY

1.1 Die-Casting Die Steel Introduction
1.2 World Die-Casting Die Steel Supply & Forecast
  1.2.1 World Die-Casting Die Steel Production Value (2021 & 2025 & 2032)
  1.2.2 World Die-Casting Die Steel Production (2021-2032)
  1.2.3 World Die-Casting Die Steel Pricing Trends (2021-2032)
1.3 World Die-Casting Die Steel Production by Region (Based on Production Site)
  1.3.1 World Die-Casting Die Steel Production Value by Region (2021-2032)
  1.3.2 World Die-Casting Die Steel Production by Region (2021-2032)
  1.3.3 World Die-Casting Die Steel Average Price by Region (2021-2032)
  1.3.4 North America Die-Casting Die Steel Production (2021-2032)
  1.3.5 Europe Die-Casting Die Steel Production (2021-2032)
  1.3.6 China Die-Casting Die Steel Production (2021-2032)
  1.3.7 Japan Die-Casting Die Steel Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Die-Casting Die Steel Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Die-Casting Die Steel Major Market Trends

2 DEMAND SUMMARY

2.1 World Die-Casting Die Steel Demand (2021-2032)
2.2 World Die-Casting Die Steel Consumption by Region
  2.2.1 World Die-Casting Die Steel Consumption by Region (2021-2026)
  2.2.2 World Die-Casting Die Steel Consumption Forecast by Region (2027-2032)
2.3 United States Die-Casting Die Steel Consumption (2021-2032)
2.4 China Die-Casting Die Steel Consumption (2021-2032)
2.5 Europe Die-Casting Die Steel Consumption (2021-2032)
2.6 Japan Die-Casting Die Steel Consumption (2021-2032)
2.7 South Korea Die-Casting Die Steel Consumption (2021-2032)
2.8 ASEAN Die-Casting Die Steel Consumption (2021-2032)
2.9 India Die-Casting Die Steel Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Die-Casting Die Steel Production Value by Manufacturer (2021-2026)

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3.2 World Die-Casting Die Steel Production by Manufacturer (2021-2026)
3.3 World Die-Casting Die Steel Average Price by Manufacturer (2021-2026)
3.4 Die-Casting Die Steel Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Die-Casting Die Steel Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Die-Casting Die Steel in 2025
  3.5.3 Global Concentration Ratios (CR8) for Die-Casting Die Steel in 2025
3.6 Die-Casting Die Steel Market: Overall Company Footprint Analysis
  3.6.1 Die-Casting Die Steel Market: Region Footprint
  3.6.2 Die-Casting Die Steel Market: Company Product Type Footprint
  3.6.3 Die-Casting Die Steel Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Die-Casting Die Steel Production Value Comparison
  4.1.1 United States VS China: Die-Casting Die Steel Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Die-Casting Die Steel Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Die-Casting Die Steel Production Comparison
  4.2.1 United States VS China: Die-Casting Die Steel Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Die-Casting Die Steel Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Die-Casting Die Steel Consumption Comparison
  4.3.1 United States VS China: Die-Casting Die Steel Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Die-Casting Die Steel Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Die-Casting Die Steel Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers Die-Casting Die Steel Production Value (2021-2026)
4.4.3 United States Based Manufacturers Die-Casting Die Steel Production (2021-2026)
4.5 China Based Die-Casting Die Steel Manufacturers and Market Share
4.5.1 China Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Die-Casting Die Steel Production Value (2021-2026)
4.5.3 China Based Manufacturers Die-Casting Die Steel Production (2021-2026)
4.6 Rest of World Based Die-Casting Die Steel Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Die-Casting Die Steel Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Die-Casting Die Steel Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Die-Casting Die Steel Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 H13 and Equivalent Steels
5.2.2 Modified and High-Quality H13
5.2.3 High-Performance Hot-Work Die Steels
5.2.4 Others
5.3 Market Segment by Type
5.3.1 World Die-Casting Die Steel Production by Type (2021-2032)
5.3.2 World Die-Casting Die Steel Production Value by Type (2021-2032)
5.3.3 World Die-Casting Die Steel Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PRODUCT FORMS

6.1 World Die-Casting Die Steel Market Size Overview by Product Forms: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Product Forms
6.2.1 Forged Blocks
6.2.2 Rolled Bars
6.2.3 Plates

+357 96 030922
info@marketpublishers.com

6.2.4 Pre-machined Blocks
6.2.5 Others
6.3 Market Segment by Product Forms
6.3.1 World Die-Casting Die Steel Production by Product Forms (2021-2032)
6.3.2 World Die-Casting Die Steel Production Value by Product Forms (2021-2032)
6.3.3 World Die-Casting Die Steel Average Price by Product Forms (2021-2032)

7 MARKET ANALYSIS BY DIE-CASTING MATERIALS

7.1 World Die-Casting Die Steel Market Size Overview by Die-Casting Materials: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Die-Casting Materials
7.2.1 Aluminum Die Casting
7.2.2 Magnesium Die Casting
7.2.3 Zinc Die Casting
7.2.4 Copper Alloy Die Casting
7.2.5 Others
7.3 Market Segment by Die-Casting Materials
7.3.1 World Die-Casting Die Steel Production by Die-Casting Materials (2021-2032)
7.3.2 World Die-Casting Die Steel Production Value by Die-Casting Materials (2021-2032)
7.3.3 World Die-Casting Die Steel Average Price by Die-Casting Materials (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Die-Casting Die Steel Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Automotive
8.2.2 Consumer Electronics
8.2.3 Industrial Machinery and Equipment
8.2.4 Others
8.3 Market Segment by Application
8.3.1 World Die-Casting Die Steel Production by Application (2021-2032)
8.3.2 World Die-Casting Die Steel Production Value by Application (2021-2032)
8.3.3 World Die-Casting Die Steel Average Price by Application (2021-2032)

9 COMPANY PROFILES

+357 96 030922
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9.1 Voestalpine
9.1.1 Voestalpine Details
9.1.2 Voestalpine Major Business
9.1.3 Voestalpine Die-Casting Die Steel Product and Services
9.1.4 Voestalpine Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Voestalpine Recent Developments/Updates
9.1.6 Voestalpine Competitive Strengths & Weaknesses
9.2 Daido Steel
9.2.1 Daido Steel Details
9.2.2 Daido Steel Major Business
9.2.3 Daido Steel Die-Casting Die Steel Product and Services
9.2.4 Daido Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Daido Steel Recent Developments/Updates
9.2.6 Daido Steel Competitive Strengths & Weaknesses
9.3 Proterial
9.3.1 Proterial Details
9.3.2 Proterial Major Business
9.3.3 Proterial Die-Casting Die Steel Product and Services
9.3.4 Proterial Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Proterial Recent Developments/Updates
9.3.6 Proterial Competitive Strengths & Weaknesses
9.4 Aubert and Duval
9.4.1 Aubert and Duval Details
9.4.2 Aubert and Duval Major Business
9.4.3 Aubert and Duval Die-Casting Die Steel Product and Services
9.4.4 Aubert and Duval Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Aubert and Duval Recent Developments/Updates
9.4.6 Aubert and Duval Competitive Strengths & Weaknesses
9.5 Kind und Co.
9.5.1 Kind und Co. Details
9.5.2 Kind und Co. Major Business
9.5.3 Kind und Co. Die-Casting Die Steel Product and Services
9.5.4 Kind und Co. Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Kind und Co. Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.5.6 Kind und Co. Competitive Strengths & Weaknesses
9.6 Sanyo Special Steel
9.6.1 Sanyo Special Steel Details
9.6.2 Sanyo Special Steel Major Business
9.6.3 Sanyo Special Steel Die-Casting Die Steel Product and Services
9.6.4 Sanyo Special Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Sanyo Special Steel Recent Developments/Updates
9.6.6 Sanyo Special Steel Competitive Strengths & Weaknesses
9.7 Nippon Koshuha Steel
9.7.1 Nippon Koshuha Steel Details
9.7.2 Nippon Koshuha Steel Major Business
9.7.3 Nippon Koshuha Steel Die-Casting Die Steel Product and Services
9.7.4 Nippon Koshuha Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Nippon Koshuha Steel Recent Developments/Updates
9.7.6 Nippon Koshuha Steel Competitive Strengths & Weaknesses
9.8 Swiss Steel Group
9.8.1 Swiss Steel Group Details
9.8.2 Swiss Steel Group Major Business
9.8.3 Swiss Steel Group Die-Casting Die Steel Product and Services
9.8.4 Swiss Steel Group Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Swiss Steel Group Recent Developments/Updates
9.8.6 Swiss Steel Group Competitive Strengths & Weaknesses
9.9 Carpenter Technology
9.9.1 Carpenter Technology Details
9.9.2 Carpenter Technology Major Business
9.9.3 Carpenter Technology Die-Casting Die Steel Product and Services
9.9.4 Carpenter Technology Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Carpenter Technology Recent Developments/Updates
9.9.6 Carpenter Technology Competitive Strengths & Weaknesses
9.10 Fushun Special Steel
9.10.1 Fushun Special Steel Details
9.10.2 Fushun Special Steel Major Business
9.10.3 Fushun Special Steel Die-Casting Die Steel Product and Services
9.10.4 Fushun Special Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.10.5 Fushun Special Steel Recent Developments/Updates
9.10.6 Fushun Special Steel Competitive Strengths & Weaknesses
9.11 Tiangong International
9.11.1 Tiangong International Details
9.11.2 Tiangong International Major Business
9.11.3 Tiangong International Die-Casting Die Steel Product and Services
9.11.4 Tiangong International Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Tiangong International Recent Developments/Updates
9.11.6 Tiangong International Competitive Strengths & Weaknesses
9.12 Dongbei Special Steel
9.12.1 Dongbei Special Steel Details
9.12.2 Dongbei Special Steel Major Business
9.12.3 Dongbei Special Steel Die-Casting Die Steel Product and Services
9.12.4 Dongbei Special Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Dongbei Special Steel Recent Developments/Updates
9.12.6 Dongbei Special Steel Competitive Strengths & Weaknesses
9.13 Baosteel Special Steel
9.13.1 Baosteel Special Steel Details
9.13.2 Baosteel Special Steel Major Business
9.13.3 Baosteel Special Steel Die-Casting Die Steel Product and Services
9.13.4 Baosteel Special Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Baosteel Special Steel Recent Developments/Updates
9.13.6 Baosteel Special Steel Competitive Strengths & Weaknesses
9.14 CITIC Special Steel
9.14.1 CITIC Special Steel Details
9.14.2 CITIC Special Steel Major Business
9.14.3 CITIC Special Steel Die-Casting Die Steel Product and Services
9.14.4 CITIC Special Steel Die-Casting Die Steel Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 CITIC Special Steel Recent Developments/Updates
9.14.6 CITIC Special Steel Competitive Strengths & Weaknesses
9.15 Jiangsu Yonggang
9.15.1 Jiangsu Yonggang Details
9.15.2 Jiangsu Yonggang Major Business
9.15.3 Jiangsu Yonggang Die-Casting Die Steel Product and Services
9.15.4 Jiangsu Yonggang Die-Casting Die Steel Production, Price, Value, Gross

+357 96 030922
info@marketpublishers.com

Margin and Market Share (2021-2026)
9.15.5 Jiangsu Yonggang Recent Developments/Updates
9.15.6 Jiangsu Yonggang Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Die-Casting Die Steel Industry Chain
10.2 Die-Casting Die Steel Upstream Analysis
10.2.1 Die-Casting Die Steel Core Raw Materials
10.2.2 Main Manufacturers of Die-Casting Die Steel Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Die-Casting Die Steel Production Mode
10.6 Die-Casting Die Steel Procurement Model
10.7 Die-Casting Die Steel Industry Sales Model and Sales Channels
10.7.1 Die-Casting Die Steel Sales Model
10.7.2 Die-Casting Die Steel Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Die-Casting Die Steel Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Die-Casting Die Steel Production Value by Region (2021-2026) & (USD Million)
Table 3. World Die-Casting Die Steel Production Value by Region (2027-2032) & (USD Million)
Table 4. World Die-Casting Die Steel Production Value Market Share by Region (2021-2026)
Table 5. World Die-Casting Die Steel Production Value Market Share by Region (2027-2032)
Table 6. World Die-Casting Die Steel Production by Region (2021-2026) & (Kilotons)
Table 7. World Die-Casting Die Steel Production by Region (2027-2032) & (Kilotons)
Table 8. World Die-Casting Die Steel Production Market Share by Region (2021-2026)
Table 9. World Die-Casting Die Steel Production Market Share by Region (2027-2032)
Table 10. World Die-Casting Die Steel Average Price by Region (2021-2026) & (US$/Ton)
Table 11. World Die-Casting Die Steel Average Price by Region (2027-2032) & (US$/Ton)
Table 12. Die-Casting Die Steel Major Market Trends
Table 13. World Die-Casting Die Steel Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)
Table 14. World Die-Casting Die Steel Consumption by Region (2021-2026) & (Kilotons)
Table 15. World Die-Casting Die Steel Consumption Forecast by Region (2027-2032) & (Kilotons)
Table 16. World Die-Casting Die Steel Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Die-Casting Die Steel Producers in 2025
Table 18. World Die-Casting Die Steel Production by Manufacturer (2021-2026) & (Kilotons)
Table 19. Production Market Share of Key Die-Casting Die Steel Producers in 2025
Table 20. World Die-Casting Die Steel Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 21. Global Die-Casting Die Steel Company Evaluation Quadrant

+357 96 030922
info@marketpublishers.com

Table 22. World Die-Casting Die Steel Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Die-Casting Die Steel Production Site of Key Manufacturer
Table 24. Die-Casting Die Steel Market: Company Product Type Footprint
Table 25. Die-Casting Die Steel Market: Company Product Application Footprint
Table 26. Die-Casting Die Steel Competitive Factors
Table 27. Die-Casting Die Steel New Entrant and Capacity Expansion Plans
Table 28. Die-Casting Die Steel Mergers & Acquisitions Activity
Table 29. United States VS China Die-Casting Die Steel Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Die-Casting Die Steel Production Comparison, (2021 & 2025 & 2032) & (Kilotons)
Table 31. United States VS China Die-Casting Die Steel Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)
Table 32. United States Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Die-Casting Die Steel Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Die-Casting Die Steel Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Die-Casting Die Steel Production (2021-2026) & (Kilotons)
Table 36. United States Based Manufacturers Die-Casting Die Steel Production Market Share (2021-2026)
Table 37. China Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Die-Casting Die Steel Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Die-Casting Die Steel Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Die-Casting Die Steel Production, (2021-2026) & (Kilotons)
Table 41. China Based Manufacturers Die-Casting Die Steel Production Market Share (2021-2026)
Table 42. Rest of World Based Die-Casting Die Steel Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Die-Casting Die Steel Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Die-Casting Die Steel Production Value

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Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Die-Casting Die Steel Production, (2021-2026) & (Kilotons)
Table 46. Rest of World Based Manufacturers Die-Casting Die Steel Production Market Share (2021-2026)
Table 47. World Die-Casting Die Steel Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Die-Casting Die Steel Production by Type (2021-2026) & (Kilotons)
Table 49. World Die-Casting Die Steel Production by Type (2027-2032) & (Kilotons)
Table 50. World Die-Casting Die Steel Production Value by Type (2021-2026) & (USD Million)
Table 51. World Die-Casting Die Steel Production Value by Type (2027-2032) & (USD Million)
Table 52. World Die-Casting Die Steel Average Price by Type (2021-2026) & (US$/Ton)
Table 53. World Die-Casting Die Steel Average Price by Type (2027-2032) & (US$/Ton)
Table 54. World Die-Casting Die Steel Production Value by Product Forms, (USD Million), 2021 & 2025 & 2032
Table 55. World Die-Casting Die Steel Production by Product Forms (2021-2026) & (Kilotons)
Table 56. World Die-Casting Die Steel Production by Product Forms (2027-2032) & (Kilotons)
Table 57. World Die-Casting Die Steel Production Value by Product Forms (2021-2026) & (USD Million)
Table 58. World Die-Casting Die Steel Production Value by Product Forms (2027-2032) & (USD Million)
Table 59. World Die-Casting Die Steel Average Price by Product Forms (2021-2026) & (US$/Ton)
Table 60. World Die-Casting Die Steel Average Price by Product Forms (2027-2032) & (US$/Ton)
Table 61. World Die-Casting Die Steel Production Value by Die-Casting Materials, (USD Million), 2021 & 2025 & 2032
Table 62. World Die-Casting Die Steel Production by Die-Casting Materials (2021-2026) & (Kilotons)
Table 63. World Die-Casting Die Steel Production by Die-Casting Materials (2027-2032) & (Kilotons)
Table 64. World Die-Casting Die Steel Production Value by Die-Casting Materials (2021-2026) & (USD Million)
Table 65. World Die-Casting Die Steel Production Value by Die-Casting Materials (2027-2032) & (USD Million)

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Table 66. World Die-Casting Die Steel Average Price by Die-Casting Materials (2021-2026) & (US$/Ton)
Table 67. World Die-Casting Die Steel Average Price by Die-Casting Materials (2027-2032) & (US$/Ton)
Table 68. World Die-Casting Die Steel Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Die-Casting Die Steel Production by Application (2021-2026) & (Kilotons)
Table 70. World Die-Casting Die Steel Production by Application (2027-2032) & (Kilotons)
Table 71. World Die-Casting Die Steel Production Value by Application (2021-2026) & (USD Million)
Table 72. World Die-Casting Die Steel Production Value by Application (2027-2032) & (USD Million)
Table 73. World Die-Casting Die Steel Average Price by Application (2021-2026) & (US$/Ton)
Table 74. World Die-Casting Die Steel Average Price by Application (2027-2032) & (US$/Ton)
Table 75. Voestalpine Basic Information, Manufacturing Base and Competitors
Table 76. Voestalpine Major Business
Table 77. Voestalpine Die-Casting Die Steel Product and Services
Table 78. Voestalpine Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Voestalpine Recent Developments/Updates
Table 80. Voestalpine Competitive Strengths & Weaknesses
Table 81. Daido Steel Basic Information, Manufacturing Base and Competitors
Table 82. Daido Steel Major Business
Table 83. Daido Steel Die-Casting Die Steel Product and Services
Table 84. Daido Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Daido Steel Recent Developments/Updates
Table 86. Daido Steel Competitive Strengths & Weaknesses
Table 87. Proterial Basic Information, Manufacturing Base and Competitors
Table 88. Proterial Major Business
Table 89. Proterial Die-Casting Die Steel Product and Services
Table 90. Proterial Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Proterial Recent Developments/Updates
Table 92. Proterial Competitive Strengths & Weaknesses

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Table 93. Aubert and Duval Basic Information, Manufacturing Base and Competitors
Table 94. Aubert and Duval Major Business
Table 95. Aubert and Duval Die-Casting Die Steel Product and Services
Table 96. Aubert and Duval Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Aubert and Duval Recent Developments/Updates
Table 98. Aubert and Duval Competitive Strengths & Weaknesses
Table 99. Kind und Co. Basic Information, Manufacturing Base and Competitors
Table 100. Kind und Co. Major Business
Table 101. Kind und Co. Die-Casting Die Steel Product and Services
Table 102. Kind und Co. Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Kind und Co. Recent Developments/Updates
Table 104. Kind und Co. Competitive Strengths & Weaknesses
Table 105. Sanyo Special Steel Basic Information, Manufacturing Base and Competitors
Table 106. Sanyo Special Steel Major Business
Table 107. Sanyo Special Steel Die-Casting Die Steel Product and Services
Table 108. Sanyo Special Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Sanyo Special Steel Recent Developments/Updates
Table 110. Sanyo Special Steel Competitive Strengths & Weaknesses
Table 111. Nippon Koshuha Steel Basic Information, Manufacturing Base and Competitors
Table 112. Nippon Koshuha Steel Major Business
Table 113. Nippon Koshuha Steel Die-Casting Die Steel Product and Services
Table 114. Nippon Koshuha Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Nippon Koshuha Steel Recent Developments/Updates
Table 116. Nippon Koshuha Steel Competitive Strengths & Weaknesses
Table 117. Swiss Steel Group Basic Information, Manufacturing Base and Competitors
Table 118. Swiss Steel Group Major Business
Table 119. Swiss Steel Group Die-Casting Die Steel Product and Services
Table 120. Swiss Steel Group Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 121. Swiss Steel Group Recent Developments/Updates
Table 122. Swiss Steel Group Competitive Strengths & Weaknesses
Table 123. Carpenter Technology Basic Information, Manufacturing Base and Competitors
Table 124. Carpenter Technology Major Business
Table 125. Carpenter Technology Die-Casting Die Steel Product and Services
Table 126. Carpenter Technology Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Carpenter Technology Recent Developments/Updates
Table 128. Carpenter Technology Competitive Strengths & Weaknesses
Table 129. Fushun Special Steel Basic Information, Manufacturing Base and Competitors
Table 130. Fushun Special Steel Major Business
Table 131. Fushun Special Steel Die-Casting Die Steel Product and Services
Table 132. Fushun Special Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Fushun Special Steel Recent Developments/Updates
Table 134. Fushun Special Steel Competitive Strengths & Weaknesses
Table 135. Tiangong International Basic Information, Manufacturing Base and Competitors
Table 136. Tiangong International Major Business
Table 137. Tiangong International Die-Casting Die Steel Product and Services
Table 138. Tiangong International Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Tiangong International Recent Developments/Updates
Table 140. Tiangong International Competitive Strengths & Weaknesses
Table 141. Dongbei Special Steel Basic Information, Manufacturing Base and Competitors
Table 142. Dongbei Special Steel Major Business
Table 143. Dongbei Special Steel Die-Casting Die Steel Product and Services
Table 144. Dongbei Special Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Dongbei Special Steel Recent Developments/Updates
Table 146. Dongbei Special Steel Competitive Strengths & Weaknesses
Table 147. Baosteel Special Steel Basic Information, Manufacturing Base and

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Competitors
Table 148. Baosteel Special Steel Major Business
Table 149. Baosteel Special Steel Die-Casting Die Steel Product and Services
Table 150. Baosteel Special Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Baosteel Special Steel Recent Developments/Updates
Table 152. Baosteel Special Steel Competitive Strengths & Weaknesses
Table 153. CITIC Special Steel Basic Information, Manufacturing Base and Competitors
Table 154. CITIC Special Steel Major Business
Table 155. CITIC Special Steel Die-Casting Die Steel Product and Services
Table 156. CITIC Special Steel Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. CITIC Special Steel Recent Developments/Updates
Table 158. CITIC Special Steel Competitive Strengths & Weaknesses
Table 159. Jiangsu Yonggang Basic Information, Manufacturing Base and Competitors
Table 160. Jiangsu Yonggang Major Business
Table 161. Jiangsu Yonggang Die-Casting Die Steel Product and Services
Table 162. Jiangsu Yonggang Die-Casting Die Steel Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Jiangsu Yonggang Recent Developments/Updates
Table 164. Jiangsu Yonggang Competitive Strengths & Weaknesses
Table 165. Global Key Players of Die-Casting Die Steel Upstream (Raw Materials)
Table 166. Global Die-Casting Die Steel Typical Customers
Table 167. Die-Casting Die Steel Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Die-Casting Die Steel Picture
Figure 2. World Die-Casting Die Steel Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Die-Casting Die Steel Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Die-Casting Die Steel Production (2021-2032) & (Kilotons)
Figure 5. World Die-Casting Die Steel Average Price (2021-2032) & (US$/Ton)
Figure 6. World Die-Casting Die Steel Production Value Market Share by Region (2021-2032)
Figure 7. World Die-Casting Die Steel Production Market Share by Region (2021-2032)
Figure 8. North America Die-Casting Die Steel Production (2021-2032) & (Kilotons)
Figure 9. Europe Die-Casting Die Steel Production (2021-2032) & (Kilotons)
Figure 10. China Die-Casting Die Steel Production (2021-2032) & (Kilotons)
Figure 11. Japan Die-Casting Die Steel Production (2021-2032) & (Kilotons)
Figure 12. Die-Casting Die Steel Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 15. World Die-Casting Die Steel Consumption Market Share by Region (2021-2032)
Figure 16. United States Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 17. China Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 18. Europe Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 19. Japan Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 20. South Korea Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 21. ASEAN Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 22. India Die-Casting Die Steel Consumption (2021-2032) & (Kilotons)
Figure 23. Producer Shipments of Die-Casting Die Steel by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Die-Casting Die Steel Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Die-Casting Die Steel Markets in 2025
Figure 26. United States VS China: Die-Casting Die Steel Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Die-Casting Die Steel Production Market Share

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Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Die-Casting Die Steel Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Die-Casting Die Steel Production Market Share 2025
Figure 30. China Based Manufacturers Die-Casting Die Steel Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Die-Casting Die Steel Production Market Share 2025
Figure 32. World Die-Casting Die Steel Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Die-Casting Die Steel Production Value Market Share by Type in 2025
Figure 34. H13 and Equivalent Steels
Figure 35. Modified and High-Quality H13
Figure 36. High-Performance Hot-Work Die Steels
Figure 37. Others
Figure 38. World Die-Casting Die Steel Production Market Share by Type (2021-2032)
Figure 39. World Die-Casting Die Steel Production Value Market Share by Type (2021-2032)
Figure 40. World Die-Casting Die Steel Average Price by Type (2021-2032) & (US$/Ton)
Figure 41. World Die-Casting Die Steel Production Value by Product Forms, (USD Million), 2021 & 2025 & 2032
Figure 42. World Die-Casting Die Steel Production Value Market Share by Product Forms in 2025
Figure 43. Forged Blocks
Figure 44. Rolled Bars
Figure 45. Plates
Figure 46. Pre-machined Blocks
Figure 47. Others
Figure 48. World Die-Casting Die Steel Production Market Share by Product Forms (2021-2032)
Figure 49. World Die-Casting Die Steel Production Value Market Share by Product Forms (2021-2032)
Figure 50. World Die-Casting Die Steel Average Price by Product Forms (2021-2032) & (US$/Ton)
Figure 51. World Die-Casting Die Steel Production Value by Die-Casting Materials, (USD Million), 2021 & 2025 & 2032
Figure 52. World Die-Casting Die Steel Production Value Market Share by Die-Casting

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Materials in 2025
Figure 53. Aluminum Die Casting
Figure 54. Magnesium Die Casting
Figure 55. Zinc Die Casting
Figure 56. Copper Alloy Die Casting
Figure 57. Others
Figure 58. World Die-Casting Die Steel Production Market Share by Die-Casting Materials (2021-2032)
Figure 59. World Die-Casting Die Steel Production Value Market Share by Die-Casting Materials (2021-2032)
Figure 60. World Die-Casting Die Steel Average Price by Die-Casting Materials (2021-2032) & (US$/Ton)
Figure 61. World Die-Casting Die Steel Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 62. World Die-Casting Die Steel Production Value Market Share by Application in 2025
Figure 63. Automotive
Figure 64. Consumer Electronics
Figure 65. Industrial Machinery and Equipment
Figure 66. Others
Figure 67. World Die-Casting Die Steel Production Market Share by Application (2021-2032)
Figure 68. World Die-Casting Die Steel Production Value Market Share by Application (2021-2032)
Figure 69. World Die-Casting Die Steel Average Price by Application (2021-2032) & (US$/Ton)
Figure 70. Die-Casting Die Steel Industry Chain
Figure 71. Die-Casting Die Steel Procurement Model
Figure 72. Die-Casting Die Steel Sales Model
Figure 73. Die-Casting Die Steel Sales Channels, Direct Sales, and Distribution
Figure 74. Methodology
Figure 75. Research Process and Data Source

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