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Global Metallographic Cold Mounting Consumables Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Metallographic Cold Mounting Consumables market size is expected to reach $ 30.51 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Metallographic mounting consumables are consumables used in the mounting step during metallographic inspection. Metallographic mounting consumables are divided into hot mounting consumables and cold mounting consumables. Hot mounting main employs thermoplastic and thermosetting resins. Cold mounting resins mainly include epoxy, acrylic resin and polyester resin.

Key Findings

Global Metallographic Mounting Consumables production reached approximately 325 tons in 2025

The average selling price reached approximately US$65 per kilogram in 2025

Epoxy is a core chemistry for low-shrinkage, low-viscosity and vacuum-impregnation applications

Acrylic and MMA systems support fast-curing and high-throughput metallographic preparation

Industrial sample preparation forms the principal recurring demand base

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Market Trends

Product development is shifting from general-purpose specimen encapsulation toward application-specific formulations with improved preparation consistency and shorter laboratory cycle times. Epoxy products are increasingly optimized for lower viscosity, reduced gap formation, high transparency, lower exotherm and faster same-day curing, while acrylic/MMA systems continue to improve hardness, edge retention, transparency and conductivity without sacrificing rapid polymerization. QATM's current portfolio, for example, includes low-viscosity epoxy systems for porous materials and assembled PCB preparation as well as newer formulations targeting reduced hazardous substances and shorter curing cycles. Light-assisted and UV/HEV curing technologies are also advancing as adjacent high-productivity routes, with some systems reducing curing time to only a few minutes. Across the market, customers increasingly value repeatable dosing, safer handling, reduced odor and volatile substances, compatibility with vacuum or pressure impregnation, and integration with automated downstream grinding and polishing workflows.

Market Dynamics

Drivers

Growth is supported by increasing requirements for microstructural inspection, manufacturing quality assurance, failure analysis, coating evaluation, welding verification, and material qualification across automotive, electronics, semiconductor, machinery, energy, aerospace, and advanced manufacturing. More complex specimens, including porous structures, multilayer electronics, composites, coatings, and additive-manufactured components, require reliable encapsulation before grinding and polishing. The expansion of automated metallographic laboratories further raises requirements for consistent mount geometry, hardness, dimensional stability, and edge retention, reinforcing recurring demand for standardized mounting consumables.

Restraints

The market remains a specialized industrial consumables segment with relatively low material consumption per specimen. Different resin chemistries also involve unavoidable trade-offs. Epoxy provides low shrinkage and strong impregnation

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performance but generally requires longer curing, while acrylic/MMA offers substantially shorter cycle times but may generate higher exotherm, odor, or shrinkage depending on formulation. Polyester products serve selected applications but have a narrower role than epoxy and acrylic systems. These formulation trade-offs limit the ability of one product platform to address all laboratories and increase the technical complexity of product selection.

Opportunities

The most attractive opportunities are concentrated in high-value sample preparation where mounting quality directly influences analytical accuracy. Electronics and semiconductor cross-sections, microvias, coatings, porous ceramics, battery materials, composites, miniature components, and advanced manufactured structures create demand for ultra-low-viscosity, transparent, low-shrinkage, low-exotherm and conductive formulations. Faster epoxy systems also offer opportunities to narrow the historical curing-time disadvantage versus acrylic products. Product suppliers can further differentiate through integrated resin, vacuum or pressure equipment, molds, dosing systems, and standardized application parameters that improve laboratory productivity and repeatability.

Challenges

Maintaining formulation consistency while balancing curing speed, shrinkage, viscosity, hardness, transparency, exotherm, storage stability, chemical safety, and cost remains the principal technical challenge. Incorrect resin selection or mixing can generate bubbles, gaps, incomplete curing, excessive heat, poor adhesion, or edge rounding, directly affecting microscopic interpretation. Environmental and occupational-safety expectations are also encouraging suppliers to reduce hazardous or high-odor components while preserving processing performance. Suppliers therefore need sustained formulation development, quality control, application support, and stable regional availability rather than relying primarily on commodity resin cost advantages.

Industry Chain Analysis

The upstream industry primarily comprises epoxy resins, acrylic and methacrylate monomers, polyester resins, curing agents, catalysts, reactive diluents, pigments, fillers, conductive additives, and packaging materials. Midstream value creation centers on

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formulation development, blending, viscosity and curing control, filling, quality assurance, application testing, and packaging into resin-hardener or powder-liquid systems. Downstream users include manufacturing quality-control laboratories, metallographic laboratories, electronics and semiconductor laboratories, third-party testing organizations, corporate R&D centers, universities, and research institutes. The principal value-added factors are formulation performance, batch consistency, sample compatibility, technical support, and integration with grinding, polishing, microscopy, and hardness-testing workflows.

Segment Insights

Epoxy represents a strategically important segment because low shrinkage, strong adhesion, low-viscosity formulations, and vacuum impregnation make it suitable for porous materials, delicate coatings, electronics, complex geometries, and high-quality edge examination. Continuous improvements in curing speed are expanding its addressable routine-preparation market. Acrylic/MMA occupies a strong position where throughput is critical, with some commercial systems curing within several minutes while retaining adequate hardness and edge retention. Conductive acrylic formulations further extend the technology into SEM-related preparation. Polyester represents a smaller specialist segment, competing primarily on economics, transparency, mechanical characteristics, or specific edge-retention requirements. Other systems remain application-specific and collectively account for a relatively limited share of consumption.

Downstream Market Opportunities

Industrial sample preparation generates recurring consumption through incoming-material inspection, production quality control, heat-treatment verification, welding and coating analysis, process validation, and failure investigation. Increasing complexity in electronics, semiconductor packaging, batteries, advanced coatings, composites, porous structures, and precision components is raising the value of mounting materials that can infiltrate fine features, preserve interfaces, minimize edge gaps, and allow accurate target positioning. Metallographic research provides an additional stable demand base, particularly for laboratories requiring flexible small-batch preparation across diverse specimen materials.

Regional Insights

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Europe has the most concentrated supplier ecosystem among the major regions, supported by established metallography and materialography companies and a broad portfolio of specialized mounting formulations. North America also has a mature market characterized by integrated sample-preparation suppliers and strong industrial laboratory demand. Asia-Pacific is becoming increasingly important as electronics, semiconductor, automotive, battery, and advanced-manufacturing quality-control capabilities expand. China combines demand growth with increasing local supply, where domestic vendors compete strongly on price, delivery responsiveness, and customized formulations while international brands retain advantages in standardized multinational laboratory workflows and premium application support.

Competitive Landscape Analysis

The market combines integrated metallographic solution providers with specialized consumables suppliers. Struers, Buehler, QATM, PRESI, Allied High Tech Products, METKON INSTRUMENTS and LECO compete through broad sample-preparation portfolios, equipment-consumable compatibility, technical support and established laboratory channels. Akasel, LAM PLAN, Kemet International, PACE Technologies, Demotec Demel, Extec, SCAN-DIA and ESCIL strengthen competition through specialized resin systems, application-oriented formulations and regional distribution capabilities. Trojan (Suzhou) Material Technology and Suzhou Feima Keyi Automation Technology expand domestic competition in China, particularly through localized product availability, technical response and price-performance positioning. Competitive differentiation is increasingly determined by curing speed, low shrinkage, edge retention, viscosity, transparency, conductivity, safety characteristics and the ability to provide integrated mounting workflows rather than by basic resin chemistry alone.

Report Scope

This report studies the global Metallographic Cold Mounting Consumables production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Metallographic Cold Mounting Consumables 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 Metallographic Cold Mounting Consumables that contribute to its increasing demand across many

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markets.

Highlights and key features of the study

Global Metallographic Cold Mounting Consumables total production and demand, 2021-2032, (Tons)

Global Metallographic Cold Mounting Consumables total production value, 2021-2032, (USD Million)

Global Metallographic Cold Mounting Consumables production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Metallographic Cold Mounting Consumables consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Metallographic Cold Mounting Consumables domestic production, consumption, key domestic manufacturers and share

Global Metallographic Cold Mounting Consumables production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Metallographic Cold Mounting Consumables production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Metallographic Cold Mounting Consumables production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Metallographic Cold Mounting Consumables 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 Struers ApS, Buehler, QATM, PRESI, Allied High Tech Products, Inc., METKON INSTRUMENTS INC., LECO Corporation, Akasel A/S, LAM PLAN S.A.S., Kemet International Ltd, etc.

This report also provides key insights about market drivers, restraints, opportunities,

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new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Metallographic Cold Mounting Consumables market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Kg) 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 Metallographic Cold Mounting Consumables Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Metallographic Cold Mounting Consumables Market,

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Segmentation by Type:

Epoxy

Acrylic Resin

Polyester Resin

Others

Global Metallographic Cold Mounting Consumables Market, Segmentation by Curing Time:

?30 Minutes

>30 Minutes–2 Hours

>2–8 Hours

>8 Hours

Global Metallographic Cold Mounting Consumables Market, Segmentation by Function:

General-purpose Type

Low-shrinkage Type

Low-viscosity Type

Other

Global Metallographic Cold Mounting Consumables Market, Segmentation by Application:

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Industrial Specimen Preparation

Metallographic Research

Companies Profiled:

Struers ApS

Buehler

QATM

PRESI

Allied High Tech Products, Inc.

METKON INSTRUMENTS INC.

LECO Corporation

Akasel A/S

LAM PLAN S.A.S.

Kemet International Ltd

PACE Technologies

Demotec Demel e.K.

Extec Corp.

SCAN-DIA GmbH & Co. KG

ESCIL

Trojan (Suzhou) Material Technology Co., Ltd.

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Suzhou Feima Keyi Automation Technology Co., Ltd.

Key Questions Answered

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

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

2.1 World Metallographic Cold Mounting Consumables Demand (2021-2032)
2.2 World Metallographic Cold Mounting Consumables Consumption by Region
  2.2.1 World Metallographic Cold Mounting Consumables Consumption by Region (2021-2026)
  2.2.2 World Metallographic Cold Mounting Consumables Consumption Forecast by Region (2027-2032)
2.3 United States Metallographic Cold Mounting Consumables Consumption (2021-2032)
2.4 China Metallographic Cold Mounting Consumables Consumption (2021-2032)

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2.5 Europe Metallographic Cold Mounting Consumables Consumption (2021-2032)
2.6 Japan Metallographic Cold Mounting Consumables Consumption (2021-2032)
2.7 South Korea Metallographic Cold Mounting Consumables Consumption (2021-2032)
2.8 ASEAN Metallographic Cold Mounting Consumables Consumption (2021-2032)
2.9 India Metallographic Cold Mounting Consumables Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Metallographic Cold Mounting Consumables Production Value by Manufacturer (2021-2026)
3.2 World Metallographic Cold Mounting Consumables Production by Manufacturer (2021-2026)
3.3 World Metallographic Cold Mounting Consumables Average Price by Manufacturer (2021-2026)
3.4 Metallographic Cold Mounting Consumables Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Metallographic Cold Mounting Consumables Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Metallographic Cold Mounting Consumables in 2025
  3.5.3 Global Concentration Ratios (CR8) for Metallographic Cold Mounting Consumables in 2025
3.6 Metallographic Cold Mounting Consumables Market: Overall Company Footprint Analysis
  3.6.1 Metallographic Cold Mounting Consumables Market: Region Footprint
  3.6.2 Metallographic Cold Mounting Consumables Market: Company Product Type Footprint
  3.6.3 Metallographic Cold Mounting Consumables 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

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4.1 United States VS China: Metallographic Cold Mounting Consumables Production Value Comparison
4.1.1 United States VS China: Metallographic Cold Mounting Consumables Production Value Comparison (2021 & 2025 & 2032)
4.1.2 United States VS China: Metallographic Cold Mounting Consumables Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Metallographic Cold Mounting Consumables Production Comparison
4.2.1 United States VS China: Metallographic Cold Mounting Consumables Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Metallographic Cold Mounting Consumables Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Metallographic Cold Mounting Consumables Consumption Comparison
4.3.1 United States VS China: Metallographic Cold Mounting Consumables Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: Metallographic Cold Mounting Consumables Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Metallographic Cold Mounting Consumables Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Metallographic Cold Mounting Consumables Production Value (2021-2026)
4.4.3 United States Based Manufacturers Metallographic Cold Mounting Consumables Production (2021-2026)
4.5 China Based Metallographic Cold Mounting Consumables Manufacturers and Market Share
4.5.1 China Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Metallographic Cold Mounting Consumables Production Value (2021-2026)
4.5.3 China Based Manufacturers Metallographic Cold Mounting Consumables Production (2021-2026)
4.6 Rest of World Based Metallographic Cold Mounting Consumables Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Metallographic Cold Mounting Consumables

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Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Metallographic Cold Mounting Consumables Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Epoxy
5.2.2 Acrylic Resin
5.2.3 Polyester Resin
5.2.4 Others
5.3 Market Segment by Type
5.3.1 World Metallographic Cold Mounting Consumables Production by Type (2021-2032)
5.3.2 World Metallographic Cold Mounting Consumables Production Value by Type (2021-2032)
5.3.3 World Metallographic Cold Mounting Consumables Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CURING TIME

6.1 World Metallographic Cold Mounting Consumables Market Size Overview by Curing Time: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Curing Time
6.2.1 ?30 Minutes
6.2.2 >30 Minutes–2 Hours
6.2.3 >2–8 Hours
6.2.4 >8 Hours
6.3 Market Segment by Curing Time
6.3.1 World Metallographic Cold Mounting Consumables Production by Curing Time (2021-2032)
6.3.2 World Metallographic Cold Mounting Consumables Production Value by Curing Time (2021-2032)
6.3.3 World Metallographic Cold Mounting Consumables Average Price by Curing Time (2021-2032)

7 MARKET ANALYSIS BY FUNCTION

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7.1 World Metallographic Cold Mounting Consumables Market Size Overview by Function: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Function
7.2.1 General-purpose Type
7.2.2 Low-shrinkage Type
7.2.3 Low-viscosity Type
7.2.4 Other
7.3 Market Segment by Function
7.3.1 World Metallographic Cold Mounting Consumables Production by Function (2021-2032)
7.3.2 World Metallographic Cold Mounting Consumables Production Value by Function (2021-2032)
7.3.3 World Metallographic Cold Mounting Consumables Average Price by Function (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Metallographic Cold Mounting Consumables Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Industrial Specimen Preparation
8.2.2 Metallographic Research
8.3 Market Segment by Application
8.3.1 World Metallographic Cold Mounting Consumables Production by Application (2021-2032)
8.3.2 World Metallographic Cold Mounting Consumables Production Value by Application (2021-2032)
8.3.3 World Metallographic Cold Mounting Consumables Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Struers ApS
9.1.1 Struers ApS Details
9.1.2 Struers ApS Major Business
9.1.3 Struers ApS Metallographic Cold Mounting Consumables Product and Services
9.1.4 Struers ApS Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.1.5 Struers ApS Recent Developments/Updates
9.1.6 Struers ApS Competitive Strengths & Weaknesses
9.2 Buehler
9.2.1 Buehler Details
9.2.2 Buehler Major Business
9.2.3 Buehler Metallographic Cold Mounting Consumables Product and Services
9.2.4 Buehler Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Buehler Recent Developments/Updates
9.2.6 Buehler Competitive Strengths & Weaknesses
9.3 QATM
9.3.1 QATM Details
9.3.2 QATM Major Business
9.3.3 QATM Metallographic Cold Mounting Consumables Product and Services
9.3.4 QATM Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 QATM Recent Developments/Updates
9.3.6 QATM Competitive Strengths & Weaknesses
9.4 PRESI
9.4.1 PRESI Details
9.4.2 PRESI Major Business
9.4.3 PRESI Metallographic Cold Mounting Consumables Product and Services
9.4.4 PRESI Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 PRESI Recent Developments/Updates
9.4.6 PRESI Competitive Strengths & Weaknesses
9.5 Allied High Tech Products, Inc.
9.5.1 Allied High Tech Products, Inc. Details
9.5.2 Allied High Tech Products, Inc. Major Business
9.5.3 Allied High Tech Products, Inc. Metallographic Cold Mounting Consumables Product and Services
9.5.4 Allied High Tech Products, Inc. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Allied High Tech Products, Inc. Recent Developments/Updates
9.5.6 Allied High Tech Products, Inc. Competitive Strengths & Weaknesses
9.6 METKON INSTRUMENTS INC.
9.6.1 METKON INSTRUMENTS INC. Details
9.6.2 METKON INSTRUMENTS INC. Major Business
9.6.3 METKON INSTRUMENTS INC. Metallographic Cold Mounting Consumables

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Product and Services
9.6.4 METKON INSTRUMENTS INC. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 METKON INSTRUMENTS INC. Recent Developments/Updates
9.6.6 METKON INSTRUMENTS INC. Competitive Strengths & Weaknesses
9.7 LECO Corporation
9.7.1 LECO Corporation Details
9.7.2 LECO Corporation Major Business
9.7.3 LECO Corporation Metallographic Cold Mounting Consumables Product and Services
9.7.4 LECO Corporation Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 LECO Corporation Recent Developments/Updates
9.7.6 LECO Corporation Competitive Strengths & Weaknesses
9.8 Akasel A/S
9.8.1 Akasel A/S Details
9.8.2 Akasel A/S Major Business
9.8.3 Akasel A/S Metallographic Cold Mounting Consumables Product and Services
9.8.4 Akasel A/S Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Akasel A/S Recent Developments/Updates
9.8.6 Akasel A/S Competitive Strengths & Weaknesses
9.9 LAM PLAN S.A.S.
9.9.1 LAM PLAN S.A.S. Details
9.9.2 LAM PLAN S.A.S. Major Business
9.9.3 LAM PLAN S.A.S. Metallographic Cold Mounting Consumables Product and Services
9.9.4 LAM PLAN S.A.S. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 LAM PLAN S.A.S. Recent Developments/Updates
9.9.6 LAM PLAN S.A.S. Competitive Strengths & Weaknesses
9.10 Kemet International Ltd
9.10.1 Kemet International Ltd Details
9.10.2 Kemet International Ltd Major Business
9.10.3 Kemet International Ltd Metallographic Cold Mounting Consumables Product and Services
9.10.4 Kemet International Ltd Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Kemet International Ltd Recent Developments/Updates

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9.10.6 Kemet International Ltd Competitive Strengths & Weaknesses
9.11 PACE Technologies
9.11.1 PACE Technologies Details
9.11.2 PACE Technologies Major Business
9.11.3 PACE Technologies Metallographic Cold Mounting Consumables Product and Services
9.11.4 PACE Technologies Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 PACE Technologies Recent Developments/Updates
9.11.6 PACE Technologies Competitive Strengths & Weaknesses
9.12 Demotec Demel e.K.
9.12.1 Demotec Demel e.K. Details
9.12.2 Demotec Demel e.K. Major Business
9.12.3 Demotec Demel e.K. Metallographic Cold Mounting Consumables Product and Services
9.12.4 Demotec Demel e.K. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Demotec Demel e.K. Recent Developments/Updates
9.12.6 Demotec Demel e.K. Competitive Strengths & Weaknesses
9.13 Extec Corp.
9.13.1 Extec Corp. Details
9.13.2 Extec Corp. Major Business
9.13.3 Extec Corp. Metallographic Cold Mounting Consumables Product and Services
9.13.4 Extec Corp. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Extec Corp. Recent Developments/Updates
9.13.6 Extec Corp. Competitive Strengths & Weaknesses
9.14 SCAN-DIA GmbH & Co. KG
9.14.1 SCAN-DIA GmbH & Co. KG Details
9.14.2 SCAN-DIA GmbH & Co. KG Major Business
9.14.3 SCAN-DIA GmbH & Co. KG Metallographic Cold Mounting Consumables Product and Services
9.14.4 SCAN-DIA GmbH & Co. KG Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 SCAN-DIA GmbH & Co. KG Recent Developments/Updates
9.14.6 SCAN-DIA GmbH & Co. KG Competitive Strengths & Weaknesses
9.15 ESCIL
9.15.1 ESCIL Details
9.15.2 ESCIL Major Business

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9.15.3 ESCIL Metallographic Cold Mounting Consumables Product and Services
9.15.4 ESCIL Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 ESCIL Recent Developments/Updates
9.15.6 ESCIL Competitive Strengths & Weaknesses
9.16 Trojan (Suzhou) Material Technology Co., Ltd.
9.16.1 Trojan (Suzhou) Material Technology Co., Ltd. Details
9.16.2 Trojan (Suzhou) Material Technology Co., Ltd. Major Business
9.16.3 Trojan (Suzhou) Material Technology Co., Ltd. Metallographic Cold Mounting Consumables Product and Services
9.16.4 Trojan (Suzhou) Material Technology Co., Ltd. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 Trojan (Suzhou) Material Technology Co., Ltd. Recent Developments/Updates
9.16.6 Trojan (Suzhou) Material Technology Co., Ltd. Competitive Strengths & Weaknesses
9.17 Suzhou Feima Keyi Automation Technology Co., Ltd.
9.17.1 Suzhou Feima Keyi Automation Technology Co., Ltd. Details
9.17.2 Suzhou Feima Keyi Automation Technology Co., Ltd. Major Business
9.17.3 Suzhou Feima Keyi Automation Technology Co., Ltd. Metallographic Cold Mounting Consumables Product and Services
9.17.4 Suzhou Feima Keyi Automation Technology Co., Ltd. Metallographic Cold Mounting Consumables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 Suzhou Feima Keyi Automation Technology Co., Ltd. Recent Developments/Updates
9.17.6 Suzhou Feima Keyi Automation Technology Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Metallographic Cold Mounting Consumables Industry Chain
10.2 Metallographic Cold Mounting Consumables Upstream Analysis
10.2.1 Metallographic Cold Mounting Consumables Core Raw Materials
10.2.2 Main Manufacturers of Metallographic Cold Mounting Consumables Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Metallographic Cold Mounting Consumables Production Mode
10.6 Metallographic Cold Mounting Consumables Procurement Model

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10.7 Metallographic Cold Mounting Consumables Industry Sales Model and Sales Channels
10.7.1 Metallographic Cold Mounting Consumables Sales Model
10.7.2 Metallographic Cold Mounting Consumables Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Metallographic Cold Mounting Consumables Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Metallographic Cold Mounting Consumables Production Value by Region (2021-2026) & (USD Million)
Table 3. World Metallographic Cold Mounting Consumables Production Value by Region (2027-2032) & (USD Million)
Table 4. World Metallographic Cold Mounting Consumables Production Value Market Share by Region (2021-2026)
Table 5. World Metallographic Cold Mounting Consumables Production Value Market Share by Region (2027-2032)
Table 6. World Metallographic Cold Mounting Consumables Production by Region (2021-2026) & (Tons)
Table 7. World Metallographic Cold Mounting Consumables Production by Region (2027-2032) & (Tons)
Table 8. World Metallographic Cold Mounting Consumables Production Market Share by Region (2021-2026)
Table 9. World Metallographic Cold Mounting Consumables Production Market Share by Region (2027-2032)
Table 10. World Metallographic Cold Mounting Consumables Average Price by Region (2021-2026) & (US$/Kg)
Table 11. World Metallographic Cold Mounting Consumables Average Price by Region (2027-2032) & (US$/Kg)
Table 12. Metallographic Cold Mounting Consumables Major Market Trends
Table 13. World Metallographic Cold Mounting Consumables Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
Table 14. World Metallographic Cold Mounting Consumables Consumption by Region (2021-2026) & (Tons)
Table 15. World Metallographic Cold Mounting Consumables Consumption Forecast by Region (2027-2032) & (Tons)
Table 16. World Metallographic Cold Mounting Consumables Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Metallographic Cold Mounting Consumables Producers in 2025
Table 18. World Metallographic Cold Mounting Consumables Production by Manufacturer (2021-2026) & (Tons)

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Table 19. Production Market Share of Key Metallographic Cold Mounting Consumables Producers in 2025
Table 20. World Metallographic Cold Mounting Consumables Average Price by Manufacturer (2021-2026) & (US$/Kg)
Table 21. Global Metallographic Cold Mounting Consumables Company Evaluation Quadrant
Table 22. World Metallographic Cold Mounting Consumables Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Metallographic Cold Mounting Consumables Production Site of Key Manufacturer
Table 24. Metallographic Cold Mounting Consumables Market: Company Product Type Footprint
Table 25. Metallographic Cold Mounting Consumables Market: Company Product Application Footprint
Table 26. Metallographic Cold Mounting Consumables Competitive Factors
Table 27. Metallographic Cold Mounting Consumables New Entrant and Capacity Expansion Plans
Table 28. Metallographic Cold Mounting Consumables Mergers & Acquisitions Activity
Table 29. United States VS China Metallographic Cold Mounting Consumables Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Metallographic Cold Mounting Consumables Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China Metallographic Cold Mounting Consumables Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Metallographic Cold Mounting Consumables Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Metallographic Cold Mounting Consumables Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Metallographic Cold Mounting Consumables Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share (2021-2026)
Table 37. China Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Metallographic Cold Mounting Consumables Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Metallographic Cold Mounting Consumables

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Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Metallographic Cold Mounting Consumables Production, (2021-2026) & (Tons)
Table 41. China Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share (2021-2026)
Table 42. Rest of World Based Metallographic Cold Mounting Consumables Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production, (2021-2026) & (Tons)
Table 46. Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share (2021-2026)
Table 47. World Metallographic Cold Mounting Consumables Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Metallographic Cold Mounting Consumables Production by Type (2021-2026) & (Tons)
Table 49. World Metallographic Cold Mounting Consumables Production by Type (2027-2032) & (Tons)
Table 50. World Metallographic Cold Mounting Consumables Production Value by Type (2021-2026) & (USD Million)
Table 51. World Metallographic Cold Mounting Consumables Production Value by Type (2027-2032) & (USD Million)
Table 52. World Metallographic Cold Mounting Consumables Average Price by Type (2021-2026) & (US$/Kg)
Table 53. World Metallographic Cold Mounting Consumables Average Price by Type (2027-2032) & (US$/Kg)
Table 54. World Metallographic Cold Mounting Consumables Production Value by Curing Time, (USD Million), 2021 & 2025 & 2032
Table 55. World Metallographic Cold Mounting Consumables Production by Curing Time (2021-2026) & (Tons)
Table 56. World Metallographic Cold Mounting Consumables Production by Curing Time (2027-2032) & (Tons)
Table 57. World Metallographic Cold Mounting Consumables Production Value by Curing Time (2021-2026) & (USD Million)
Table 58. World Metallographic Cold Mounting Consumables Production Value by Curing Time (2027-2032) & (USD Million)

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Table 59. World Metallographic Cold Mounting Consumables Average Price by Curing Time (2021-2026) & (US$/Kg)
Table 60. World Metallographic Cold Mounting Consumables Average Price by Curing Time (2027-2032) & (US$/Kg)
Table 61. World Metallographic Cold Mounting Consumables Production Value by Function, (USD Million), 2021 & 2025 & 2032
Table 62. World Metallographic Cold Mounting Consumables Production by Function (2021-2026) & (Tons)
Table 63. World Metallographic Cold Mounting Consumables Production by Function (2027-2032) & (Tons)
Table 64. World Metallographic Cold Mounting Consumables Production Value by Function (2021-2026) & (USD Million)
Table 65. World Metallographic Cold Mounting Consumables Production Value by Function (2027-2032) & (USD Million)
Table 66. World Metallographic Cold Mounting Consumables Average Price by Function (2021-2026) & (US$/Kg)
Table 67. World Metallographic Cold Mounting Consumables Average Price by Function (2027-2032) & (US$/Kg)
Table 68. World Metallographic Cold Mounting Consumables Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Metallographic Cold Mounting Consumables Production by Application (2021-2026) & (Tons)
Table 70. World Metallographic Cold Mounting Consumables Production by Application (2027-2032) & (Tons)
Table 71. World Metallographic Cold Mounting Consumables Production Value by Application (2021-2026) & (USD Million)
Table 72. World Metallographic Cold Mounting Consumables Production Value by Application (2027-2032) & (USD Million)
Table 73. World Metallographic Cold Mounting Consumables Average Price by Application (2021-2026) & (US$/Kg)
Table 74. World Metallographic Cold Mounting Consumables Average Price by Application (2027-2032) & (US$/Kg)
Table 75. Struers ApS Basic Information, Manufacturing Base and Competitors
Table 76. Struers ApS Major Business
Table 77. Struers ApS Metallographic Cold Mounting Consumables Product and Services
Table 78. Struers ApS Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 79. Struers ApS Recent Developments/Updates
Table 80. Struers ApS Competitive Strengths & Weaknesses
Table 81. Buehler Basic Information, Manufacturing Base and Competitors
Table 82. Buehler Major Business
Table 83. Buehler Metallographic Cold Mounting Consumables Product and Services
Table 84. Buehler Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Buehler Recent Developments/Updates
Table 86. Buehler Competitive Strengths & Weaknesses
Table 87. QATM Basic Information, Manufacturing Base and Competitors
Table 88. QATM Major Business
Table 89. QATM Metallographic Cold Mounting Consumables Product and Services
Table 90. QATM Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. QATM Recent Developments/Updates
Table 92. QATM Competitive Strengths & Weaknesses
Table 93. PRESI Basic Information, Manufacturing Base and Competitors
Table 94. PRESI Major Business
Table 95. PRESI Metallographic Cold Mounting Consumables Product and Services
Table 96. PRESI Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. PRESI Recent Developments/Updates
Table 98. PRESI Competitive Strengths & Weaknesses
Table 99. Allied High Tech Products, Inc. Basic Information, Manufacturing Base and Competitors
Table 100. Allied High Tech Products, Inc. Major Business
Table 101. Allied High Tech Products, Inc. Metallographic Cold Mounting Consumables Product and Services
Table 102. Allied High Tech Products, Inc. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Allied High Tech Products, Inc. Recent Developments/Updates
Table 104. Allied High Tech Products, Inc. Competitive Strengths & Weaknesses
Table 105. METKON INSTRUMENTS INC. Basic Information, Manufacturing Base and Competitors
Table 106. METKON INSTRUMENTS INC. Major Business
Table 107. METKON INSTRUMENTS INC. Metallographic Cold Mounting Consumables Product and Services
Table 108. METKON INSTRUMENTS INC. Metallographic Cold Mounting Consumables

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Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. METKON INSTRUMENTS INC. Recent Developments/Updates
Table 110. METKON INSTRUMENTS INC. Competitive Strengths & Weaknesses
Table 111. LECO Corporation Basic Information, Manufacturing Base and Competitors
Table 112. LECO Corporation Major Business
Table 113. LECO Corporation Metallographic Cold Mounting Consumables Product and Services
Table 114. LECO Corporation Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. LECO Corporation Recent Developments/Updates
Table 116. LECO Corporation Competitive Strengths & Weaknesses
Table 117. Akasel A/S Basic Information, Manufacturing Base and Competitors
Table 118. Akasel A/S Major Business
Table 119. Akasel A/S Metallographic Cold Mounting Consumables Product and Services
Table 120. Akasel A/S Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Akasel A/S Recent Developments/Updates
Table 122. Akasel A/S Competitive Strengths & Weaknesses
Table 123. LAM PLAN S.A.S. Basic Information, Manufacturing Base and Competitors
Table 124. LAM PLAN S.A.S. Major Business
Table 125. LAM PLAN S.A.S. Metallographic Cold Mounting Consumables Product and Services
Table 126. LAM PLAN S.A.S. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. LAM PLAN S.A.S. Recent Developments/Updates
Table 128. LAM PLAN S.A.S. Competitive Strengths & Weaknesses
Table 129. Kemet International Ltd Basic Information, Manufacturing Base and Competitors
Table 130. Kemet International Ltd Major Business
Table 131. Kemet International Ltd Metallographic Cold Mounting Consumables Product and Services
Table 132. Kemet International Ltd Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 133. Kemet International Ltd Recent Developments/Updates
Table 134. Kemet International Ltd Competitive Strengths & Weaknesses
Table 135. PACE Technologies Basic Information, Manufacturing Base and Competitors
Table 136. PACE Technologies Major Business
Table 137. PACE Technologies Metallographic Cold Mounting Consumables Product and Services
Table 138. PACE Technologies Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. PACE Technologies Recent Developments/Updates
Table 140. PACE Technologies Competitive Strengths & Weaknesses
Table 141. Demotec Demel e.K. Basic Information, Manufacturing Base and Competitors
Table 142. Demotec Demel e.K. Major Business
Table 143. Demotec Demel e.K. Metallographic Cold Mounting Consumables Product and Services
Table 144. Demotec Demel e.K. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Demotec Demel e.K. Recent Developments/Updates
Table 146. Demotec Demel e.K. Competitive Strengths & Weaknesses
Table 147. Extec Corp. Basic Information, Manufacturing Base and Competitors
Table 148. Extec Corp. Major Business
Table 149. Extec Corp. Metallographic Cold Mounting Consumables Product and Services
Table 150. Extec Corp. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Extec Corp. Recent Developments/Updates
Table 152. Extec Corp. Competitive Strengths & Weaknesses
Table 153. SCAN-DIA GmbH & Co. KG Basic Information, Manufacturing Base and Competitors
Table 154. SCAN-DIA GmbH & Co. KG Major Business
Table 155. SCAN-DIA GmbH & Co. KG Metallographic Cold Mounting Consumables Product and Services
Table 156. SCAN-DIA GmbH & Co. KG Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 157. SCAN-DIA GmbH & Co. KG Recent Developments/Updates
Table 158. SCAN-DIA GmbH & Co. KG Competitive Strengths & Weaknesses
Table 159. ESCIL Basic Information, Manufacturing Base and Competitors
Table 160. ESCIL Major Business
Table 161. ESCIL Metallographic Cold Mounting Consumables Product and Services
Table 162. ESCIL Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. ESCIL Recent Developments/Updates
Table 164. ESCIL Competitive Strengths & Weaknesses
Table 165. Trojan (Suzhou) Material Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 166. Trojan (Suzhou) Material Technology Co., Ltd. Major Business
Table 167. Trojan (Suzhou) Material Technology Co., Ltd. Metallographic Cold Mounting Consumables Product and Services
Table 168. Trojan (Suzhou) Material Technology Co., Ltd. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Trojan (Suzhou) Material Technology Co., Ltd. Recent Developments/Updates
Table 170. Trojan (Suzhou) Material Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 171. Suzhou Feima Keyi Automation Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 172. Suzhou Feima Keyi Automation Technology Co., Ltd. Major Business
Table 173. Suzhou Feima Keyi Automation Technology Co., Ltd. Metallographic Cold Mounting Consumables Product and Services
Table 174. Suzhou Feima Keyi Automation Technology Co., Ltd. Metallographic Cold Mounting Consumables Production (Tons), Price (US$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Suzhou Feima Keyi Automation Technology Co., Ltd. Recent Developments/Updates
Table 176. Suzhou Feima Keyi Automation Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 177. Global Key Players of Metallographic Cold Mounting Consumables Upstream (Raw Materials)
Table 178. Global Metallographic Cold Mounting Consumables Typical Customers
Table 179. Metallographic Cold Mounting Consumables Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Metallographic Cold Mounting Consumables Picture
Figure 2. World Metallographic Cold Mounting Consumables Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Metallographic Cold Mounting Consumables Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Metallographic Cold Mounting Consumables Production (2021-2032) & (Tons)
Figure 5. World Metallographic Cold Mounting Consumables Average Price (2021-2032) & (US$/Kg)
Figure 6. World Metallographic Cold Mounting Consumables Production Value Market Share by Region (2021-2032)
Figure 7. World Metallographic Cold Mounting Consumables Production Market Share by Region (2021-2032)
Figure 8. North America Metallographic Cold Mounting Consumables Production (2021-2032) & (Tons)
Figure 9. Europe Metallographic Cold Mounting Consumables Production (2021-2032) & (Tons)
Figure 10. China Metallographic Cold Mounting Consumables Production (2021-2032) & (Tons)
Figure 11. Japan Metallographic Cold Mounting Consumables Production (2021-2032) & (Tons)
Figure 12. Metallographic Cold Mounting Consumables Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 15. World Metallographic Cold Mounting Consumables Consumption Market Share by Region (2021-2032)
Figure 16. United States Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 17. China Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 18. Europe Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 19. Japan Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)

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Figure 20. South Korea Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 21. ASEAN Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 22. India Metallographic Cold Mounting Consumables Consumption (2021-2032) & (Tons)
Figure 23. Producer Shipments of Metallographic Cold Mounting Consumables by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Metallographic Cold Mounting Consumables Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Metallographic Cold Mounting Consumables Markets in 2025
Figure 26. United States VS China: Metallographic Cold Mounting Consumables Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Metallographic Cold Mounting Consumables Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Metallographic Cold Mounting Consumables Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share 2025
Figure 30. China Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Metallographic Cold Mounting Consumables Production Market Share 2025
Figure 32. World Metallographic Cold Mounting Consumables Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Metallographic Cold Mounting Consumables Production Value Market Share by Type in 2025
Figure 34. Epoxy
Figure 35. Acrylic Resin
Figure 36. Polyester Resin
Figure 37. Others
Figure 38. World Metallographic Cold Mounting Consumables Production Market Share by Type (2021-2032)
Figure 39. World Metallographic Cold Mounting Consumables Production Value Market Share by Type (2021-2032)
Figure 40. World Metallographic Cold Mounting Consumables Average Price by Type (2021-2032) & (US$/Kg)
Figure 41. World Metallographic Cold Mounting Consumables Production Value by

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Curing Time, (USD Million), 2021 & 2025 & 2032
Figure 42. World Metallographic Cold Mounting Consumables Production Value Market Share by Curing Time in 2025
Figure 43. ?30 Minutes
Figure 44. >30 Minutes–2 Hours
Figure 45. >2–8 Hours
Figure 46. >8 Hours
Figure 47. World Metallographic Cold Mounting Consumables Production Market Share by Curing Time (2021-2032)
Figure 48. World Metallographic Cold Mounting Consumables Production Value Market Share by Curing Time (2021-2032)
Figure 49. World Metallographic Cold Mounting Consumables Average Price by Curing Time (2021-2032) & (US$/Kg)
Figure 50. World Metallographic Cold Mounting Consumables Production Value by Function, (USD Million), 2021 & 2025 & 2032
Figure 51. World Metallographic Cold Mounting Consumables Production Value Market Share by Function in 2025
Figure 52. General-purpose Type
Figure 53. Low-shrinkage Type
Figure 54. Low-viscosity Type
Figure 55. Other
Figure 56. World Metallographic Cold Mounting Consumables Production Market Share by Function (2021-2032)
Figure 57. World Metallographic Cold Mounting Consumables Production Value Market Share by Function (2021-2032)
Figure 58. World Metallographic Cold Mounting Consumables Average Price by Function (2021-2032) & (US$/Kg)
Figure 59. World Metallographic Cold Mounting Consumables Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 60. World Metallographic Cold Mounting Consumables Production Value Market Share by Application in 2025
Figure 61. Industrial Specimen Preparation
Figure 62. Metallographic Research
Figure 63. World Metallographic Cold Mounting Consumables Production Market Share by Application (2021-2032)
Figure 64. World Metallographic Cold Mounting Consumables Production Value Market Share by Application (2021-2032)
Figure 65. World Metallographic Cold Mounting Consumables Average Price by Application (2021-2032) & (US$/Kg)

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Figure 66. Metallographic Cold Mounting Consumables Industry Chain
Figure 67. Metallographic Cold Mounting Consumables Procurement Model
Figure 68. Metallographic Cold Mounting Consumables Sales Model
Figure 69. Metallographic Cold Mounting Consumables Sales Channels, Direct Sales, and Distribution
Figure 70. Methodology
Figure 71. Research Process and Data Source

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