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Global Precision Gear Materials Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GE6172215D95EN.html
Date: November 2026
Pages: 129
Price: US$ 4,480.00 (Single User License)
ID: GE6172215D95EN

Abstracts

The global Precision Gear Materials market size is expected to reach $ 11019 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Precision gear materials are engineered metallic materials used to manufacture gears, ring gears, planetary gears, and related transmission components that require tight dimensional accuracy, high load capacity, long fatigue life, and stable heat-treatment response. This study focuses on high-quality alloy steels, specialty steels, and a smaller share of powder-metallurgy gear materials purchased directly for gear blanks and precision drivetrain parts. Major material families include case-hardening gear steels, nitriding steels, quenched-and-tempered gear steels, stainless gear steels, and high-cleanliness or high-strength premium gear steels. Key purchasing parameters include hardenability, steel cleanliness, contact and bending fatigue strength, surface-hardening response, heat-treatment distortion, machinability and forgeability, dimensional range, and product form. Major downstream markets include automotive and e-mobility, robotics and automation, machine tools and industrial machinery, aerospace, and wind-power drivetrains. Product development is increasingly centered on higher cleanliness, lower distortion, reduced dependence on Ni/Mo alloying, compatibility with vacuum or low-pressure carburizing, and longer fatigue life at higher power density. The blended gross margin is approximately 20%.

Market Trends

Precision gear materials are shifting from standard carburizing grades toward higher-cleanliness, tighter-hardenability, low-distortion and vacuum-carburizing-compatible steels. Electric-drive reduction gears, compact robot reducers, high-speed machine tools and larger wind gearboxes require higher contact and bending fatigue strength

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while maintaining predictable dimensional response after heat treatment. Suppliers are also reducing Ni and Mo intensity, improving cold-forging and machinability, and designing grades for shorter carburizing cycles. Premium remelted and ultra-clean alloys remain concentrated in aerospace and mission-critical drivetrains, while high-volume automotive and industrial programs favor scalable clean-steel routes that balance fatigue performance, process yield and cost.

Drivers

Demand is supported by higher vehicle output and electrification, expansion of industrial automation, rising robot installations, growth in wind-power drivetrains and the continuing push for smaller and lighter transmission systems. Higher rotational speed and torque density increase the value of materials with better fatigue strength, inclusion control, hardenability and heat-treatment stability.

Restraints

Nickel, molybdenum, chromium, scrap and energy costs can materially affect specialty-steel pricing, while premium melting and remelting routes raise conversion cost. Long customer qualification cycles, strict metallurgical specifications and the need to match downstream forging, machining and heat-treatment processes also slow supplier switching and new-grade adoption.

Opportunities

The strongest opportunities are in e-axle reduction gears, compact planetary stages for industrial and humanoid robots, higher-load machine-tool drives, large wind gearboxes and low-distortion precision gears. Grades optimized for low-pressure carburizing, clean-steel production, alloy savings and improved machinability can capture value by reducing downstream heat-treatment time, grinding allowance and scrap.

Challenges

Suppliers must maintain consistent inclusion control, hardenability bands and distortion behavior across large production lots while meeting different regional standards and OEM specifications. The market also faces technical substitution between carburizing,

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nitriding, induction hardening and powder-metallurgy routes, making application-specific validation and process integration increasingly important.

Industry Chain Analysis

Upstream inputs include steel scrap or iron units, ferroalloys such as chromium, manganese, nickel and molybdenum, refractories, electrodes, process gases and energy. Midstream production covers melting, secondary refining, vacuum degassing, optional ESR or VAR remelting, casting, rolling or forging, spheroidizing or annealing, surface conditioning and nondestructive inspection. Downstream processors convert bars, billets, rings or powders into gear blanks through forging or compaction, followed by machining, carburizing or nitriding, quenching, grinding and final inspection.

Value creation is concentrated in metallurgical cleanliness, composition and hardenability control, low-distortion behavior, fatigue performance and customer qualification rather than in base steel tonnage alone. Alloy surcharges, energy, yield loss, secondary refining and quality inspection are major cost factors, while premium grades earn higher value through process savings, longer component life and higher allowable power density.

Segment Insights

Case-hardening gear steels remain the largest material family because they combine a hard wear-resistant surface with a tough core and are well suited to automotive, industrial and wind transmission gears. Nitriding grades are favored where low distortion and dimensional retention are critical, while quenched-and-tempered or induction-hardening grades address selected larger or less complex gears. Powder-metallurgy materials hold a smaller share but remain important for high-volume compact gears and near-net-shape production.

Premium growth is concentrated in ultra-clean, narrow-hardenability and high-strength grades as well as remelted alloys for aerospace and other mission-critical applications. The commercial advantage increasingly comes from reducing downstream processing steps and enabling smaller gear geometry rather than from alloy content alone.

Downstream Market Opportunities

Automotive remains the largest purchasing sector, but the fastest specification

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upgrades are occurring in electric-drive reduction systems and robotics, where smaller gears must transmit higher torque at higher speed with low noise and controlled backlash. Wind-power gearboxes create demand for large, fatigue-resistant materials, while aerospace rewards premium cleanliness, thermal stability and traceability. Machine tools and industrial automation provide a broad recurring base for low-distortion and high-precision gear grades.

Regional Insights

Asia-Pacific is the largest regional market because it combines the world's densest automotive, robotics, machine-tool and specialty-steel manufacturing clusters. China, Japan and South Korea are central to both material supply and downstream gear production, with premium demand increasingly linked to electric vehicles, robots and high-end equipment. Europe remains strong in premium engineering steels, wind drivetrains and precision machinery, while North America has a differentiated position in aerospace-grade gear alloys, automotive powertrain materials and large industrial applications.

Regional competition is becoming more localized as OEMs seek shorter supply chains and stable qualification. This favors producers that can combine global metallurgical standards with local rolling, heat-treatment support, technical service and delivery capability.

Competitive Landscape Analysis

Competition is split between large specialty-steel producers serving high-volume automotive and industrial programs and premium alloy suppliers focused on aerospace, defense and other demanding applications. Entry barriers are created by clean-steel capability, secondary refining and remelting know-how, control of hardenability and inclusions, fatigue-data libraries, long OEM qualification cycles and consistent global supply. Leading suppliers differentiate through proprietary high-cleanliness grades, low-distortion carburizing or nitriding steels, alloy-saving chemistries, machining performance and application engineering. Chinese producers continue to improve high-end automotive, wind and industrial gear-steel capability, while the strictest aerospace and ultra-clean applications still place a premium on mature qualification records and advanced melting routes.

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Report Scope

This report studies the global Precision Gear Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Precision Gear Materials 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 Precision Gear Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Precision Gear Materials total production and demand, 2021-2032, (kg)

Global Precision Gear Materials total production value, 2021-2032, (USD Million)

Global Precision Gear Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Precision Gear Materials consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Precision Gear Materials domestic production, consumption, key domestic manufacturers and share

Global Precision Gear Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Precision Gear Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Precision Gear Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

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This report profiles key players in the global Precision Gear Materials 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 Ovako, Nippon Steel, JFE Steel, Daido Steel, Sanyo Special Steel, Aichi Steel, Metallus, Swiss Steel Group, voestalpine, Carpenter Technology, 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 Precision Gear Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (kg) 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 Precision Gear Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global Precision Gear Materials Market, Segmentation by Type:

Round Bars

Wire Rods

Forged Bars and Billets

Rings and Gear Blanks

Steel Powders

Other Forms

Global Precision Gear Materials Market, Segmentation by Alloy System:

Plain Carbon Steel

Mn-Cr Gear Steel

Cr-Mo Gear Steel

Ni-Cr-Mo Gear Steel

Stainless and High-Alloy Steel

Other Alloy Steel

Global Precision Gear Materials Market, Segmentation by Carbon Content:

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Low-Carbon Materials (?0.25% C)

Medium-Carbon Materials (>0.25–0.60% C)

High-Carbon Materials (>0.60% C)

Global Precision Gear Materials Market, Segmentation by Application:

Automotive and E-Mobility

Robotics and Automation

Machine Tools and Industrial Machinery

Aerospace and Defense

Wind Power and Energy

Others

Companies Profiled:

Ovako

Nippon Steel

JFE Steel

Daido Steel

Sanyo Special Steel

Aichi Steel

Metallus

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Swiss Steel Group

voestalpine

Carpenter Technology

CITIC Pacific Special Steel

Dongbei Special Steel Group

Baosteel

Kobe Steel

Liberty Steel Group

Key Questions Answered

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

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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3.1 World Precision Gear Materials Production Value by Manufacturer (2021-2026)
3.2 World Precision Gear Materials Production by Manufacturer (2021-2026)
3.3 World Precision Gear Materials Average Price by Manufacturer (2021-2026)
3.4 Precision Gear Materials Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Precision Gear Materials Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Precision Gear Materials in 2025
  3.5.3 Global Concentration Ratios (CR8) for Precision Gear Materials in 2025
3.6 Precision Gear Materials Market: Overall Company Footprint Analysis
  3.6.1 Precision Gear Materials Market: Region Footprint
  3.6.2 Precision Gear Materials Market: Company Product Type Footprint
  3.6.3 Precision Gear Materials 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: Precision Gear Materials Production Value Comparison
  4.1.1 United States VS China: Precision Gear Materials Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Precision Gear Materials Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Precision Gear Materials Production Comparison
  4.2.1 United States VS China: Precision Gear Materials Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Precision Gear Materials Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Precision Gear Materials Consumption Comparison
  4.3.1 United States VS China: Precision Gear Materials Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Precision Gear Materials Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Precision Gear Materials Manufacturers and Market Share, 2021-2026

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

5 MARKET ANALYSIS BY TYPE

5.1 World Precision Gear Materials Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Round Bars
5.2.2 Wire Rods
5.2.3 Forged Bars and Billets
5.2.4 Rings and Gear Blanks
5.2.5 Steel Powders
5.2.6 Other Forms
5.3 Market Segment by Type
5.3.1 World Precision Gear Materials Production by Type (2021-2032)
5.3.2 World Precision Gear Materials Production Value by Type (2021-2032)
5.3.3 World Precision Gear Materials Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ALLOY SYSTEM

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info@marketpublishers.com

6.1 World Precision Gear Materials Market Size Overview by Alloy System: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Alloy System
6.2.1 Plain Carbon Steel
6.2.2 Mn-Cr Gear Steel
6.2.3 Cr-Mo Gear Steel
6.2.4 Ni-Cr-Mo Gear Steel
6.2.5 Stainless and High-Alloy Steel
6.2.6 Other Alloy Steel
6.3 Market Segment by Alloy System
6.3.1 World Precision Gear Materials Production by Alloy System (2021-2032)
6.3.2 World Precision Gear Materials Production Value by Alloy System (2021-2032)
6.3.3 World Precision Gear Materials Average Price by Alloy System (2021-2032)

7 MARKET ANALYSIS BY CARBON CONTENT

7.1 World Precision Gear Materials Market Size Overview by Carbon Content: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Carbon Content
7.2.1 Low-Carbon Materials (?0.25% C)
7.2.2 Medium-Carbon Materials (>0.25–0.60% C)
7.2.3 High-Carbon Materials (>0.60% C)
7.3 Market Segment by Carbon Content
7.3.1 World Precision Gear Materials Production by Carbon Content (2021-2032)
7.3.2 World Precision Gear Materials Production Value by Carbon Content (2021-2032)
7.3.3 World Precision Gear Materials Average Price by Carbon Content (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Precision Gear Materials Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Automotive and E-Mobility
8.2.2 Robotics and Automation
8.2.3 Machine Tools and Industrial Machinery
8.2.4 Aerospace and Defense
8.2.5 Wind Power and Energy
8.2.6 Others

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8.3 Market Segment by Application
8.3.1 World Precision Gear Materials Production by Application (2021-2032)
8.3.2 World Precision Gear Materials Production Value by Application (2021-2032)
8.3.3 World Precision Gear Materials Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Ovako
9.1.1 Ovako Details
9.1.2 Ovako Major Business
9.1.3 Ovako Precision Gear Materials Product and Services
9.1.4 Ovako Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Ovako Recent Developments/Updates
9.1.6 Ovako Competitive Strengths & Weaknesses
9.2 Nippon Steel
9.2.1 Nippon Steel Details
9.2.2 Nippon Steel Major Business
9.2.3 Nippon Steel Precision Gear Materials Product and Services
9.2.4 Nippon Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Nippon Steel Recent Developments/Updates
9.2.6 Nippon Steel Competitive Strengths & Weaknesses
9.3 JFE Steel
9.3.1 JFE Steel Details
9.3.2 JFE Steel Major Business
9.3.3 JFE Steel Precision Gear Materials Product and Services
9.3.4 JFE Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 JFE Steel Recent Developments/Updates
9.3.6 JFE Steel Competitive Strengths & Weaknesses
9.4 Daido Steel
9.4.1 Daido Steel Details
9.4.2 Daido Steel Major Business
9.4.3 Daido Steel Precision Gear Materials Product and Services
9.4.4 Daido Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Daido Steel Recent Developments/Updates
9.4.6 Daido Steel Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

9.5 Sanyo Special Steel
9.5.1 Sanyo Special Steel Details
9.5.2 Sanyo Special Steel Major Business
9.5.3 Sanyo Special Steel Precision Gear Materials Product and Services
9.5.4 Sanyo Special Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Sanyo Special Steel Recent Developments/Updates
9.5.6 Sanyo Special Steel Competitive Strengths & Weaknesses
9.6 Aichi Steel
9.6.1 Aichi Steel Details
9.6.2 Aichi Steel Major Business
9.6.3 Aichi Steel Precision Gear Materials Product and Services
9.6.4 Aichi Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Aichi Steel Recent Developments/Updates
9.6.6 Aichi Steel Competitive Strengths & Weaknesses
9.7 Metallus
9.7.1 Metallus Details
9.7.2 Metallus Major Business
9.7.3 Metallus Precision Gear Materials Product and Services
9.7.4 Metallus Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Metallus Recent Developments/Updates
9.7.6 Metallus 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 Precision Gear Materials Product and Services
9.8.4 Swiss Steel Group Precision Gear Materials 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 voestalpine
9.9.1 voestalpine Details
9.9.2 voestalpine Major Business
9.9.3 voestalpine Precision Gear Materials Product and Services
9.9.4 voestalpine Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 voestalpine Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.9.6 voestalpine Competitive Strengths & Weaknesses
9.10 Carpenter Technology
9.10.1 Carpenter Technology Details
9.10.2 Carpenter Technology Major Business
9.10.3 Carpenter Technology Precision Gear Materials Product and Services
9.10.4 Carpenter Technology Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Carpenter Technology Recent Developments/Updates
9.10.6 Carpenter Technology Competitive Strengths & Weaknesses
9.11 CITIC Pacific Special Steel
9.11.1 CITIC Pacific Special Steel Details
9.11.2 CITIC Pacific Special Steel Major Business
9.11.3 CITIC Pacific Special Steel Precision Gear Materials Product and Services
9.11.4 CITIC Pacific Special Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 CITIC Pacific Special Steel Recent Developments/Updates
9.11.6 CITIC Pacific Special Steel Competitive Strengths & Weaknesses
9.12 Dongbei Special Steel Group
9.12.1 Dongbei Special Steel Group Details
9.12.2 Dongbei Special Steel Group Major Business
9.12.3 Dongbei Special Steel Group Precision Gear Materials Product and Services
9.12.4 Dongbei Special Steel Group Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Dongbei Special Steel Group Recent Developments/Updates
9.12.6 Dongbei Special Steel Group Competitive Strengths & Weaknesses
9.13 Baosteel
9.13.1 Baosteel Details
9.13.2 Baosteel Major Business
9.13.3 Baosteel Precision Gear Materials Product and Services
9.13.4 Baosteel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Baosteel Recent Developments/Updates
9.13.6 Baosteel Competitive Strengths & Weaknesses
9.14 Kobe Steel
9.14.1 Kobe Steel Details
9.14.2 Kobe Steel Major Business
9.14.3 Kobe Steel Precision Gear Materials Product and Services
9.14.4 Kobe Steel Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.14.5 Kobe Steel Recent Developments/Updates
9.14.6 Kobe Steel Competitive Strengths & Weaknesses
9.15 Liberty Steel Group
9.15.1 Liberty Steel Group Details
9.15.2 Liberty Steel Group Major Business
9.15.3 Liberty Steel Group Precision Gear Materials Product and Services
9.15.4 Liberty Steel Group Precision Gear Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Liberty Steel Group Recent Developments/Updates
9.15.6 Liberty Steel Group Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Precision Gear Materials Industry Chain
10.2 Precision Gear Materials Upstream Analysis
10.2.1 Precision Gear Materials Core Raw Materials
10.2.2 Main Manufacturers of Precision Gear Materials Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Precision Gear Materials Production Mode
10.6 Precision Gear Materials Procurement Model
10.7 Precision Gear Materials Industry Sales Model and Sales Channels
10.7.1 Precision Gear Materials Sales Model
10.7.2 Precision Gear Materials 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 Precision Gear Materials Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Precision Gear Materials Production Value by Region (2021-2026) & (USD Million)
Table 3. World Precision Gear Materials Production Value by Region (2027-2032) & (USD Million)
Table 4. World Precision Gear Materials Production Value Market Share by Region (2021-2026)
Table 5. World Precision Gear Materials Production Value Market Share by Region (2027-2032)
Table 6. World Precision Gear Materials Production by Region (2021-2026) & (kg)
Table 7. World Precision Gear Materials Production by Region (2027-2032) & (kg)
Table 8. World Precision Gear Materials Production Market Share by Region (2021-2026)
Table 9. World Precision Gear Materials Production Market Share by Region (2027-2032)
Table 10. World Precision Gear Materials Average Price by Region (2021-2026) & (US$/kg)
Table 11. World Precision Gear Materials Average Price by Region (2027-2032) & (US$/kg)
Table 12. Precision Gear Materials Major Market Trends
Table 13. World Precision Gear Materials Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (kg)
Table 14. World Precision Gear Materials Consumption by Region (2021-2026) & (kg)
Table 15. World Precision Gear Materials Consumption Forecast by Region (2027-2032) & (kg)
Table 16. World Precision Gear Materials Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Precision Gear Materials Producers in 2025
Table 18. World Precision Gear Materials Production by Manufacturer (2021-2026) & (kg)
Table 19. Production Market Share of Key Precision Gear Materials Producers in 2025
Table 20. World Precision Gear Materials Average Price by Manufacturer (2021-2026) & (US$/kg)

+357 96 030922
info@marketpublishers.com

Table 21. Global Precision Gear Materials Company Evaluation Quadrant
Table 22. World Precision Gear Materials Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Precision Gear Materials Production Site of Key Manufacturer
Table 24. Precision Gear Materials Market: Company Product Type Footprint
Table 25. Precision Gear Materials Market: Company Product Application Footprint
Table 26. Precision Gear Materials Competitive Factors
Table 27. Precision Gear Materials New Entrant and Capacity Expansion Plans
Table 28. Precision Gear Materials Mergers & Acquisitions Activity
Table 29. United States VS China Precision Gear Materials Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Precision Gear Materials Production Comparison, (2021 & 2025 & 2032) & (kg)
Table 31. United States VS China Precision Gear Materials Consumption Comparison, (2021 & 2025 & 2032) & (kg)
Table 32. United States Based Precision Gear Materials Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Precision Gear Materials Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Precision Gear Materials Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Precision Gear Materials Production (2021-2026) & (kg)
Table 36. United States Based Manufacturers Precision Gear Materials Production Market Share (2021-2026)
Table 37. China Based Precision Gear Materials Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Precision Gear Materials Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Precision Gear Materials Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Precision Gear Materials Production, (2021-2026) & (kg)
Table 41. China Based Manufacturers Precision Gear Materials Production Market Share (2021-2026)
Table 42. Rest of World Based Precision Gear Materials Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Precision Gear Materials Production

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Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Precision Gear Materials Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Precision Gear Materials Production, (2021-2026) & (kg)
Table 46. Rest of World Based Manufacturers Precision Gear Materials Production Market Share (2021-2026)
Table 47. World Precision Gear Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Precision Gear Materials Production by Type (2021-2026) & (kg)
Table 49. World Precision Gear Materials Production by Type (2027-2032) & (kg)
Table 50. World Precision Gear Materials Production Value by Type (2021-2026) & (USD Million)
Table 51. World Precision Gear Materials Production Value by Type (2027-2032) & (USD Million)
Table 52. World Precision Gear Materials Average Price by Type (2021-2026) & (US$/kg)
Table 53. World Precision Gear Materials Average Price by Type (2027-2032) & (US$/kg)
Table 54. World Precision Gear Materials Production Value by Alloy System, (USD Million), 2021 & 2025 & 2032
Table 55. World Precision Gear Materials Production by Alloy System (2021-2026) & (kg)
Table 56. World Precision Gear Materials Production by Alloy System (2027-2032) & (kg)
Table 57. World Precision Gear Materials Production Value by Alloy System (2021-2026) & (USD Million)
Table 58. World Precision Gear Materials Production Value by Alloy System (2027-2032) & (USD Million)
Table 59. World Precision Gear Materials Average Price by Alloy System (2021-2026) & (US$/kg)
Table 60. World Precision Gear Materials Average Price by Alloy System (2027-2032) & (US$/kg)
Table 61. World Precision Gear Materials Production Value by Carbon Content, (USD Million), 2021 & 2025 & 2032
Table 62. World Precision Gear Materials Production by Carbon Content (2021-2026) & (kg)
Table 63. World Precision Gear Materials Production by Carbon Content (2027-2032) & (kg)

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Table 64. World Precision Gear Materials Production Value by Carbon Content (2021-2026) & (USD Million)
Table 65. World Precision Gear Materials Production Value by Carbon Content (2027-2032) & (USD Million)
Table 66. World Precision Gear Materials Average Price by Carbon Content (2021-2026) & (US$/kg)
Table 67. World Precision Gear Materials Average Price by Carbon Content (2027-2032) & (US$/kg)
Table 68. World Precision Gear Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Precision Gear Materials Production by Application (2021-2026) & (kg)
Table 70. World Precision Gear Materials Production by Application (2027-2032) & (kg)
Table 71. World Precision Gear Materials Production Value by Application (2021-2026) & (USD Million)
Table 72. World Precision Gear Materials Production Value by Application (2027-2032) & (USD Million)
Table 73. World Precision Gear Materials Average Price by Application (2021-2026) & (US$/kg)
Table 74. World Precision Gear Materials Average Price by Application (2027-2032) & (US$/kg)
Table 75. Ovako Basic Information, Manufacturing Base and Competitors
Table 76. Ovako Major Business
Table 77. Ovako Precision Gear Materials Product and Services
Table 78. Ovako Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Ovako Recent Developments/Updates
Table 80. Ovako Competitive Strengths & Weaknesses
Table 81. Nippon Steel Basic Information, Manufacturing Base and Competitors
Table 82. Nippon Steel Major Business
Table 83. Nippon Steel Precision Gear Materials Product and Services
Table 84. Nippon Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Nippon Steel Recent Developments/Updates
Table 86. Nippon Steel Competitive Strengths & Weaknesses
Table 87. JFE Steel Basic Information, Manufacturing Base and Competitors
Table 88. JFE Steel Major Business
Table 89. JFE Steel Precision Gear Materials Product and Services
Table 90. JFE Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 91. JFE Steel Recent Developments/Updates
Table 92. JFE Steel Competitive Strengths & Weaknesses
Table 93. Daido Steel Basic Information, Manufacturing Base and Competitors
Table 94. Daido Steel Major Business
Table 95. Daido Steel Precision Gear Materials Product and Services
Table 96. Daido Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Daido Steel Recent Developments/Updates
Table 98. Daido Steel Competitive Strengths & Weaknesses
Table 99. Sanyo Special Steel Basic Information, Manufacturing Base and Competitors
Table 100. Sanyo Special Steel Major Business
Table 101. Sanyo Special Steel Precision Gear Materials Product and Services
Table 102. Sanyo Special Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Sanyo Special Steel Recent Developments/Updates
Table 104. Sanyo Special Steel Competitive Strengths & Weaknesses
Table 105. Aichi Steel Basic Information, Manufacturing Base and Competitors
Table 106. Aichi Steel Major Business
Table 107. Aichi Steel Precision Gear Materials Product and Services
Table 108. Aichi Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Aichi Steel Recent Developments/Updates
Table 110. Aichi Steel Competitive Strengths & Weaknesses
Table 111. Metallus Basic Information, Manufacturing Base and Competitors
Table 112. Metallus Major Business
Table 113. Metallus Precision Gear Materials Product and Services
Table 114. Metallus Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Metallus Recent Developments/Updates
Table 116. Metallus 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 Precision Gear Materials Product and Services
Table 120. Swiss Steel Group Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Swiss Steel Group Recent Developments/Updates
Table 122. Swiss Steel Group Competitive Strengths & Weaknesses
Table 123. voestalpine Basic Information, Manufacturing Base and Competitors
Table 124. voestalpine Major Business

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Table 125. voestalpine Precision Gear Materials Product and Services
Table 126. voestalpine Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. voestalpine Recent Developments/Updates
Table 128. voestalpine Competitive Strengths & Weaknesses
Table 129. Carpenter Technology Basic Information, Manufacturing Base and Competitors
Table 130. Carpenter Technology Major Business
Table 131. Carpenter Technology Precision Gear Materials Product and Services
Table 132. Carpenter Technology Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Carpenter Technology Recent Developments/Updates
Table 134. Carpenter Technology Competitive Strengths & Weaknesses
Table 135. CITIC Pacific Special Steel Basic Information, Manufacturing Base and Competitors
Table 136. CITIC Pacific Special Steel Major Business
Table 137. CITIC Pacific Special Steel Precision Gear Materials Product and Services
Table 138. CITIC Pacific Special Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. CITIC Pacific Special Steel Recent Developments/Updates
Table 140. CITIC Pacific Special Steel Competitive Strengths & Weaknesses
Table 141. Dongbei Special Steel Group Basic Information, Manufacturing Base and Competitors
Table 142. Dongbei Special Steel Group Major Business
Table 143. Dongbei Special Steel Group Precision Gear Materials Product and Services
Table 144. Dongbei Special Steel Group Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Dongbei Special Steel Group Recent Developments/Updates
Table 146. Dongbei Special Steel Group Competitive Strengths & Weaknesses
Table 147. Baosteel Basic Information, Manufacturing Base and Competitors
Table 148. Baosteel Major Business
Table 149. Baosteel Precision Gear Materials Product and Services
Table 150. Baosteel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Baosteel Recent Developments/Updates
Table 152. Baosteel Competitive Strengths & Weaknesses
Table 153. Kobe Steel Basic Information, Manufacturing Base and Competitors
Table 154. Kobe Steel Major Business

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Table 155. Kobe Steel Precision Gear Materials Product and Services
Table 156. Kobe Steel Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Kobe Steel Recent Developments/Updates
Table 158. Kobe Steel Competitive Strengths & Weaknesses
Table 159. Liberty Steel Group Basic Information, Manufacturing Base and Competitors
Table 160. Liberty Steel Group Major Business
Table 161. Liberty Steel Group Precision Gear Materials Product and Services
Table 162. Liberty Steel Group Precision Gear Materials Production (kg), Price (US$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Liberty Steel Group Recent Developments/Updates
Table 164. Liberty Steel Group Competitive Strengths & Weaknesses
Table 165. Global Key Players of Precision Gear Materials Upstream (Raw Materials)
Table 166. Global Precision Gear Materials Typical Customers
Table 167. Precision Gear Materials Typical Distributors

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List Of Figures

LIST OF FIGURES

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

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Figure 28. United States VS China: Precision Gear Materials Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States VS China: Precision Gear Materials Production Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States VS China: Precision Gear Materials Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 31. United States Based Manufacturers Precision Gear Materials Production Market Share 2025
Figure 32. China Based Manufacturers Precision Gear Materials Production Market Share 2025
Figure 33. Rest of World Based Manufacturers Precision Gear Materials Production Market Share 2025
Figure 34. World Precision Gear Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 35. World Precision Gear Materials Production Value Market Share by Type in 2025
Figure 36. Round Bars
Figure 37. Wire Rods
Figure 38. Forged Bars and Billets
Figure 39. Rings and Gear Blanks
Figure 40. Steel Powders
Figure 41. Other Forms
Figure 42. World Precision Gear Materials Production Market Share by Type (2021-2032)
Figure 43. World Precision Gear Materials Production Value Market Share by Type (2021-2032)
Figure 44. World Precision Gear Materials Average Price by Type (2021-2032) & (US$/kg)
Figure 45. World Precision Gear Materials Production Value by Alloy System, (USD Million), 2021 & 2025 & 2032
Figure 46. World Precision Gear Materials Production Value Market Share by Alloy System in 2025
Figure 47. Plain Carbon Steel
Figure 48. Mn-Cr Gear Steel
Figure 49. Cr-Mo Gear Steel
Figure 50. Ni-Cr-Mo Gear Steel
Figure 51. Stainless and High-Alloy Steel
Figure 52. Other Alloy Steel
Figure 53. World Precision Gear Materials Production Market Share by Alloy System

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(2021-2032)
Figure 54. World Precision Gear Materials Production Value Market Share by Alloy System (2021-2032)
Figure 55. World Precision Gear Materials Average Price by Alloy System (2021-2032) & (US$/kg)
Figure 56. World Precision Gear Materials Production Value by Carbon Content, (USD Million), 2021 & 2025 & 2032
Figure 57. World Precision Gear Materials Production Value Market Share by Carbon Content in 2025
Figure 58. Low-Carbon Materials (?0.25% C)
Figure 59. Medium-Carbon Materials (>0.25–0.60% C)
Figure 60. High-Carbon Materials (>0.60% C)
Figure 61. World Precision Gear Materials Production Market Share by Carbon Content (2021-2032)
Figure 62. World Precision Gear Materials Production Value Market Share by Carbon Content (2021-2032)
Figure 63. World Precision Gear Materials Average Price by Carbon Content (2021-2032) & (US$/kg)
Figure 64. World Precision Gear Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 65. World Precision Gear Materials Production Value Market Share by Application in 2025
Figure 66. Automotive and E-Mobility
Figure 67. Robotics and Automation
Figure 68. Machine Tools and Industrial Machinery
Figure 69. Aerospace and Defense
Figure 70. Wind Power and Energy
Figure 71. Others
Figure 72. World Precision Gear Materials Production Market Share by Application (2021-2032)
Figure 73. World Precision Gear Materials Production Value Market Share by Application (2021-2032)
Figure 74. World Precision Gear Materials Average Price by Application (2021-2032) & (US$/kg)
Figure 75. Precision Gear Materials Industry Chain
Figure 76. Precision Gear Materials Procurement Model
Figure 77. Precision Gear Materials Sales Model
Figure 78. Precision Gear Materials Sales Channels, Direct Sales, and Distribution
Figure 79. Methodology

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Figure 80. Research Process and Data Source

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