

Global Tungsten Carbide Scrap Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tungsten Carbide Scrap market size is expected to reach \$ 1935 million by 2032, rising at a market growth of 1.4% CAGR during the forecast period (2026-2032).

The tungsten carbide scrap market represents the traded and processed secondary hardmetal feedstock used to recover tungsten (and often cobalt) back into industrial supply chains.

In the current market, global production is around 31,500 metric tons, with an average selling price of about 50,000 USD per metric ton EXW basis. Market activity is tightly linked to hardmetal consumption in machining and wear applications, as well as to metal price cycles that influence collection rates, sorting intensity, and recycler purchasing behavior. The market includes both hard scrap (spent tools and wear parts) and soft scrap (swarf and grinding sludge), with price and acceptance criteria primarily determined by the recoverable metal content, contamination profile, and traceability of the scrap stream.

Across the value chain, competition is defined less by brand positioning and more by sourcing reach, assay/sorting capability, compliance handling for residues, and the ability to deliver consistent recycled tungsten units to downstream powder or chemical conversion. Large closed-loop buyers and specialized recyclers often operate collection programs that stabilize feedstock supply, while independent recyclers compete on speed, grading discipline, and risk control under volatile pricing. Major barriers to entry include reliable scrap sourcing networks, robust grading and contamination control, working-capital intensity under metal price volatility, and qualified downstream offtake routes for recovered tungsten products. From a market-structure perspective, the industry is moderately concentrated at the top but still fragmented regionally; the top five

producers are estimated to account for about 40% of global volume, reflecting the presence of several large integrated hardmetal groups alongside many local and mid-sized recyclers.

Profitability is driven by the spread between scrap purchase costs and the realizable value of recovered tungsten units, net of processing losses and compliance costs. Under normal conditions, a typical gross margin is estimated at 18%, with margins compressing when scrap prices rise faster than realizable product prices, and expanding when recyclers can secure high-grade feedstock at disciplined discounts. Looking forward to 2031, volume growth is expected to be steady rather than explosive, supported by continued hardmetal usage in precision machining, mining, and industrial wear; however, the market's headline value can fluctuate sharply depending on tungsten price levels. As a result, the outlook combines incremental physical growth with price-driven variability, with recyclers that have strong closed-loop capture, stable downstream conversion pathways, and tight quality control best positioned to sustain performance through commodity cycles.

This report studies the global Tungsten Carbide Scrap production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tungsten Carbide Scrap 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 Tungsten Carbide Scrap that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tungsten Carbide Scrap total production and demand, 2021-2032, (Tons)

Global Tungsten Carbide Scrap total production value, 2021-2032, (USD Million)

Global Tungsten Carbide Scrap production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Tungsten Carbide Scrap consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Tungsten Carbide Scrap domestic production, consumption, key domestic manufacturers and share

Global Tungsten Carbide Scrap production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Tungsten Carbide Scrap production by Scrap Form, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Tungsten Carbide Scrap production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Tungsten Carbide Scrap 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 Sandvik, Kennametal, CERATIZIT, Hyperion Materials & Technologies, Sumitomo Electric, BETEK, CRONIMET Specialty Metals, Tungco, Global Tungsten & Powders, H.C. Starck Tungsten Powders, 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 Tungsten Carbide Scrap market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Scrap Form, 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 Tungsten Carbide Scrap Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tungsten Carbide Scrap Market, Segmentation by Scrap Form:

Solid Hard Scrap

Soft Scrap Swarf Turnings

Grinding Sludge Filter Media

Fines Powders Overspray

Mixed Contaminated Scrap

Global Tungsten Carbide Scrap Market, Segmentation by Recycling Route:

Zinc Reclaim

Other Direct Methods

Chemical Recycling

Other Routes

Global Tungsten Carbide Scrap Market, Segmentation by Application:

Cemented Carbide Toolmaking Feedstock

Mining Rock-Drilling Wear Parts

Oil Gas Wear Components

Hardfacing Thermal Spray Powders

Tungsten Chemicals Intermediates

Other End Uses

Companies Profiled:

Sandvik

Kennametal

CERATIZIT

Hyperion Materials & Technologies

Sumitomo Electric

BETEK

CRONIMET Specialty Metals

Tungco

Global Tungsten & Powders

H.C. Starck Tungsten Powders

Wolfram Bergbau und Huetten

ALMT

Kohsei

Lianyou Metal Technology

GEM

Key Questions Answered:

1. How big is the global Tungsten Carbide Scrap market?

2. What is the demand of the global Tungsten Carbide Scrap market?
3. What is the year over year growth of the global Tungsten Carbide Scrap market?
4. What is the production and production value of the global Tungsten Carbide Scrap market?
5. Who are the key producers in the global Tungsten Carbide Scrap market?
6. What are the growth factors driving the market demand?

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