

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

<https://marketpublishers.com/r/G37A1B8F4160EN.html>

Date: July 2026

Pages: 157

Price: US\$ 4,480.00 (Single User License)

ID: G37A1B8F4160EN

Abstracts

The global Tungsten Carbide market size is expected to reach \$ 6085 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Tungsten powder is a high-density, grey-black metal powder produced by converting tungsten concentrate into intermediates such as ammonium paratungstate (APT) and tungsten oxide, followed by hydrogen reduction, screening, batch blending, surface treatment, and particle size control. Characterized by a high melting point, high density, high hardness, and resistance to high temperatures and wear, as well as electrical and thermal conductivity and sinterability, it is primarily used in cemented carbides, tungsten alloys, tungsten-copper alloys, electronic materials, thermal spraying, additive manufacturing, military counterweights, and high-temperature structural materials. In 2025, global sales volume is approximately 86,500 metric tons, with an average unit price of around \$45,500 per ton and a global capacity utilization rate of approximately 76.8%. Upstream enterprises include those involved in tungsten mining and beneficiation, APT and tungsten oxide production, hydrogen and industrial gas supply, and the manufacture of reduction furnaces, powder screening and classification equipment, testing equipment, and packaging materials. Downstream enterprises include manufacturers of cemented carbides, cutting tools, mining tools, wear-resistant parts, tungsten-copper contacts, electronic packaging materials, additive manufacturing powders, military materials, and high-temperature materials; the industry's average gross profit margin is approximately 27.5%. Regarding the cost structure, tungsten raw materials (such as APT and tungsten oxide) account for approximately 72%, hydrogen and reduction energy consumption for about 6%, and pulverization, screening, and particle size control for about 5%. Labor and factory management account for approximately 4%; equipment depreciation and maintenance for 3%; inspection and quality control for 3%; environmental treatment for 2%; packaging, warehousing, and

logistics for 3%; and other expenses for 2%. The demand portfolio encompasses requirements for cemented carbide raw materials, cutting tools, mining drilling tools, wear-resistant components, tungsten-copper alloys, electronic packaging, thermal spray powders, spherical powders for additive manufacturing, high-density materials for defense applications, and high-temperature sintering materials. Downstream customers include manufacturers of cemented carbide, CNC cutting tools, mining tools, oil and gas drilling/extraction tools, electronic materials, tungsten-copper alloys, and thermal spray materials, as well as metal powder additive manufacturing enterprises, defense industry suppliers, and research institutes. Regarding business opportunities, policy drivers stem from critical mineral resource security, the upgrading of advanced manufacturing, the localization of cemented carbide production, the assurance of materials for high-end equipment, and strategic metal supply chain management. Technological innovation is driven by advancements in ultrafine, nano, and spherical tungsten powders, as well as processes for low-oxygen control, narrow particle size distribution, continuous reduction, plasma spheroidization, and high-purity processing. Shifts in consumer demand reflect a transition from standard powders to high-performance tungsten powders characterized by stable particle size, lower impurity levels, superior flowability, enhanced sintering performance, and strong batch-to-batch consistency?specifically tailored for high-end cutting tools and additive manufacturing applications.

Tungsten powder is a crucial intermediate product in the tungsten industry chain, linking upstream tungsten resources with downstream applications such as cemented carbides, high-temperature materials, and electronic materials. With global sales volume reaching approximately 86,500 tons in 2025, overall demand is closely tied to manufacturing activity and the requirements of sectors including machining, mining, energy drilling, electronic packaging, and defense materials. Cemented carbide remains the primary downstream market for tungsten powder; specifically, applications such as CNC cutting tools, mining alloys, wear-resistant parts, and mold materials demand consistent particle size and sintering performance. Consequently, while the market for standard tungsten powder exhibits cyclicalities, ultra-fine, high-purity, spherical, and low-oxygen tungsten powders command higher added value. China remains the central hub for the global supply of tungsten resources, ammonium paratungstate (APT), and tungsten powder, benefiting from cost advantages and a comprehensive industry chain; however, customers in Europe, the US, Japan, and South Korea prioritize long-term certification, consistent quality, and supply security within the high-end cemented carbide, electronic materials, and defense supply chains. Over the next two to five years, market growth will not rely solely on increasing total volume; instead, opportunities will increasingly stem from product structure upgrades?including ultra-fine

powders for high-end cutting tools, high-purity powders for electronic packaging, powders with consistent particle size for thermal spraying, spherical powders for additive manufacturing, and high-density alloy powders for defense applications. Key industry risks include fluctuations in tungsten ore prices, environmental regulations, changes in export controls, cyclical shifts in downstream manufacturing, and price competition in the low-end powder segment. Overall, the tungsten powder industry is poised for steady growth, with a strategic shift toward high-end, specialized, and customized products serving as the key to improving profit margins; companies possessing capabilities in resource security, reduction process control, particle size management, impurity control, and customer certification will be better positioned to secure stable orders.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Tungsten Carbide 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 Xiamen Tungsten Co., Ltd. (CN), China Tungsten and Hightech Materials Co., Ltd. (CN), Chongyi Zhangyuan Tungsten Co., Ltd. (CN), CMOC Group Limited (CN), Global Tungsten & Powders Corp. (US), H.C. Starck Tungsten Powders GmbH (DE), Kennametal Inc. (US), Masan High-Tech Materials Corporation (VN), Plansee SE (AT), Wolfram Bergbau und Hütten AG (AT), 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 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 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 Tungsten Carbide Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tungsten Carbide Market, Segmentation by Type:

≤0.5mm

0.5-1mm

1-5mm

≥5mm

Global Tungsten Carbide Market, Segmentation by Purity:

≥99%

99.0%

99.5%

99.9%

≥99.9%

Global Tungsten Carbide Market, Segmentation by Grade:

FW-1

FW-2

FWP-1

Global Tungsten Carbide Market, Segmentation by Application:

Construction Machinery

Metal Cutting

Machine Tools

Electronic Information

Aerospace & Defense

Others

Companies Profiled:

Xiamen Tungsten Co., Ltd. (CN)

China Tungsten and Hightech Materials Co., Ltd. (CN)

Chongyi Zhangyuan Tungsten Co., Ltd. (CN)

CMOC Group Limited (CN)

Global Tungsten & Powders Corp. (US)

H.C. Starck Tungsten Powders GmbH (DE)

Kennametal Inc. (US)

Masan High-Tech Materials Corporation (VN)

Plansee SE (AT)

Wolfram Bergbau und Hütten AG (AT)

Almonty Industries Inc. (US)

Japan New Metals Co., Ltd. (JP)

Nippon Tungsten Co., Ltd. (JP)

Buffalo Tungsten Inc. (US)

Elmet Technologies LLC (US)

Tungsten West Plc (GB)

EQ Resources Limited (AU)

Tungsten Mining NL (AU)

Group 6 Metals Limited (AU)

ATI (Allegheny Technologies Inc.) (US)

Guangdong Xianglu Tungsten Co., Ltd. (CN)

Key Questions Answered:

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

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