

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

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Abstracts

The global Tungsten market size is expected to reach \$ 10052 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

Tungsten is a critical metal material characterized by a high melting point, high density, high hardness, and superior wear resistance. It is produced from tungsten ore and recycled tungsten resources through processes such as beneficiation, hydrometallurgy, ammonium paratungstate (APT) crystallization, oxidation, reduction, carburization, powder metallurgy, sintering, rolling, drawing, and machining. Key products include tungsten concentrate, APT, tungsten oxide, tungsten powder, tungsten carbide powder, tungsten rods, tungsten wire, tungsten plates, tungsten-copper alloys, and heavy tungsten alloys. In 2025, global sales volume was approximately 86,800 tons, with an average unit price of around \$72,673 per ton and an industry capacity utilization rate of approximately 82.5%. Upstream enterprises operate in sectors such as tungsten mining and beneficiation, tungsten-bearing scrap recycling, chemical smelting, hydrogen reduction, and the manufacturing of carburization and powder metallurgy equipment. Downstream enterprises operate in fields including cemented carbide, cutting tools, mining tools, oil and gas drilling tools, aerospace, defense and military industry, semiconductor equipment, electronics and electrical engineering, thermal management, and high-temperature furnace components. The industry's average gross profit margin is approximately 31.6%. The product cost structure is broken down as follows: tungsten concentrate and recycled tungsten raw materials (approx. 52%), smelting and chemical processing (approx. 12%), reduction, carburization, and powder processing (approx. 11%), energy and hydrogen (approx. 6%), labor and manufacturing overhead (approx. 5%), equipment depreciation (approx. 5%), environmental protection, safety, and quality control (approx. 4%), and packaging, logistics, and inventory capital costs (approx. 5%). Regarding demand, downstream product categories include cemented carbide powder,

cutting tools, mining drilling tools, oil and gas drill bits, wear-resistant spray powders, tungsten-copper heat sinks, semiconductor equipment components, aerospace high-temperature parts, defense high-density alloys, medical shielding components, and high-temperature furnace tungsten parts. Downstream customers include cemented carbide manufacturers, cutting tool companies, mining equipment manufacturers, oilfield service tool companies, aerospace component manufacturers, defense material enterprises, semiconductor equipment manufacturers, electronic material enterprises, thermal management component manufacturers, and recycled metal enterprises. In terms of business opportunities, policy drivers stem from the need for critical mineral security, export controls, the localization of defense supply chains, and increased demand for strategic metal reserves; technological innovation is driven by advancements in fine-grained tungsten carbide powder, low-oxygen high-purity tungsten powder, closed-loop tungsten recycling, 3D printing tungsten powder, tungsten-copper composites, and high-end refractory metal processing; and shifting consumer demands are reflected in high-end manufacturing clients placing greater emphasis on supply traceability, batch consistency, wear resistance and service life, material efficiency, and multi-source procurement.

The tungsten industry represents a strategic resource sector within the mature materials landscape; in the short term, pricing and supply chain security have become increasingly critical, while in the medium to long term, demand growth is driven by high-end manufacturing and the domestic substitution of key materials rather than mere volume expansion. Cemented carbide remains the largest downstream application, with cutting tools, mining tools, oil and gas drilling equipment, and wear-resistant parts providing a stable foundation; however, sectors such as aerospace, defense, semiconductor equipment, electronic thermal management, high-temperature thermal fields, and energy equipment are increasing the value share of high-purity tungsten powder, fine-grained tungsten carbide powder, tungsten-copper composites, heavy tungsten alloys, and high-end tungsten products. The supply landscape is characterized by China's dominance in resources and intermediate products, the prowess of Europe, the US, and Japan in high-end powders and deep processing capabilities, and the role of mining projects in Vietnam, South Korea, Australia, and Europe in filling the non-Chinese supply gap. Future competition will extend beyond mine output to encompass APT smelting capacity, powder particle size control, tungsten recycling, low-oxygen high-purity processing, customer certification, export licensing, and regional supply chain resilience. Due to significant price volatility, long mine development cycles, and stringent environmental and safety regulations, new entrants face challenges in rapidly scaling up production in the short term; conversely, enterprises possessing integrated capabilities across resources, smelting, powder production, and recycling will enjoy

greater bargaining power. Overall, the tungsten market is projected to maintain steady growth from 2026 to 2032, with high-end powders, recycled tungsten, non-Chinese supply chains, and tungsten products for the semiconductor and defense sectors emerging as the most promising areas for business opportunity.

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

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

Highlights and key features of the study

Global Tungsten total production and demand, 2021-2032, (K MT)

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

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

Global Tungsten consumption by region & country, CAGR, 2021-2032 & (K MT)

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

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

Global Tungsten production by Granularity, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

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

This report profiles key players in the global Tungsten 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 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Granularity, 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 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tungsten Market, Segmentation by Granularity:

Up to 1?m

1-10?m

10-50?m

Others

Global Tungsten Market, Segmentation by Purity:

Pure Tungsten

Tungsten Alloy

Others

Global Tungsten Market, Segmentation by Grade:

FW-1

FW-2

FWP-1

Global Tungsten Market, Segmentation by Application:

Cemented Carbide

Tungsten Mill Products

Steel and Alloy

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

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