

Global Powder Metallurgy High-Speed Steel Market Growth 2026-2032

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Abstracts

The global Powder Metallurgy High-Speed Steel market size is predicted to grow from US\$ 743 million in 2025 to US\$ 1061 million in 2032; it is expected to grow at a CAGR of 5.3% from 2026 to 2032.

Powder Metallurgy High-Speed Steel (PM-HSS) is a class of highly alloyed high-speed tool steels manufactured through powder metallurgy processing. The production route typically begins with melting steel containing alloying elements such as tungsten, molybdenum, vanadium, cobalt, and chromium, followed by inert-gas atomization to produce fine alloy powders. These powders are subsequently canned, vacuum degassed, consolidated by hot isostatic pressing (HIP), and further processed through forging, rolling, heat treatment, and finishing into bars, plates, flats, wires, billets, and other semi-finished steel forms. Compared with conventionally produced high-speed steel, PM-HSS features finer and more uniformly distributed carbides, lower alloy segregation, and improved microstructural consistency, resulting in enhanced wear resistance, toughness, resistance to edge chipping, hot hardness, and dimensional stability. The powder metallurgy route also enables higher alloying levels, particularly for vanadium- and cobalt-rich grades. Commercial PM-HSS products are differentiated by alloy composition, hardness, wear resistance, toughness, and supply form, and are widely used in high-performance cutting tools, gear-cutting tools, stamping dies, cold-work tooling, industrial knives, and other tooling applications requiring high wear resistance, strength, and reliability.

Key Findings

Powder Metallurgy High-Speed Steel is an important upgrade path for advanced high-speed tool steel

High-vanadium and cobalt-containing grades represent important segments of the high-performance product portfolio

Round bars and flat bars and plates are major commercial supply forms

Cutting tools represent the core downstream application for Powder Metallurgy High-Speed Steel

Global supply combines established European, American, and Japanese producers with expanding Chinese manufacturers

Market Trends

Powder Metallurgy High-Speed Steel is continuing to evolve toward higher alloy content, stronger wear resistance, improved toughness, and more stable heat-treatment performance. Increasing requirements from advanced cutting tools and precision tooling for longer service life, consistency, and performance under demanding operating conditions are shifting competition from basic grade availability toward carbide control, cleanliness, heat-treatment response, and batch-to-batch stability. At the same time, Chinese manufacturers are strengthening gas atomization, HIP consolidation, forging, and rolling capabilities, gradually expanding their coverage of higher-end PM-HSS grades.

Market Dynamics

Drivers

Growing performance requirements in advanced cutting tools, gear-cutting tools, precision stamping tools, and cold work tooling are key drivers for Powder Metallurgy High-Speed Steel. Compared with conventional high-speed steel, PM-HSS offers more uniform carbide distribution and an improved balance between wear resistance and toughness, supporting longer tool life and more consistent machining performance. These advantages increase its material value in high-load, high-precision, and difficult-to-machine material applications.

Restraints

PM-HSS manufacturing involves multiple capital- and energy-intensive processes,

including alloy melting, gas atomization, powder handling, canning, hot isostatic pressing, forging, and rolling, resulting in substantially higher production costs than conventional high-speed steel. Price volatility in cobalt, vanadium, tungsten, and molybdenum can further affect manufacturing economics. In standard cutting and general tooling applications, conventional high-speed steel, cemented carbide, and other tool steels can also retain a significant cost advantage.

Opportunities

Localization of high-performance cutting tools, upgrades in advanced manufacturing equipment, and increasing machining requirements in aerospace, electric vehicles, precision machinery, and other demanding industries create structural opportunities for PM-HSS. High-vanadium grades, high-cobalt grades, and customized compositions balancing wear resistance and toughness offer further room for product differentiation. The continued development of domestic powder metallurgy production lines in China also supports import substitution, regional supply, and the development of dedicated grades for local tool manufacturers.

Challenges

A major challenge in PM-HSS production is maintaining consistent powder quality, oxygen content, carbide size, alloy homogeneity, and HIP densification under industrial-scale conditions. High-performance grades also require extensive heat-treatment, grinding, and cutting validation with downstream tool manufacturers, resulting in relatively long qualification cycles for new suppliers. Continued improvements in cemented carbide, powder metallurgy cold work steels, and other advanced tool materials may also create substitution pressure in selected applications.

Industry Chain Analysis

The upstream Powder Metallurgy High-Speed Steel industry chain includes iron-based raw materials, alloying elements such as tungsten, molybdenum, vanadium, chromium, and cobalt, as well as high-purity inert gases, HIP equipment, and powder metallurgy production systems. Midstream manufacturing centers on alloy melting, gas atomization, powder screening and blending, canning and degassing, hot isostatic pressing, forging, rolling, and heat treatment. Through composition design and microstructure control, manufacturers develop grades with different combinations of wear resistance, toughness, and hot hardness. Downstream markets mainly include cutting tools, cold work tooling, plastic processing tooling, and wear parts. Value creation is concentrated in high-quality powder production, carbide control, HIP

consolidation, grade development, and stable industrial-scale manufacturing, giving advanced PM-HSS grades a clear technical premium over conventional high-speed steel.

Segment Insights

By cobalt content, the market is divided into Cobalt-Free Type, Low-Cobalt Type (<8%), and High-Cobalt Type (>8%). Cobalt-free grades reduce raw-material costs and dependence on cobalt, while cobalt-containing grades place greater emphasis on hot hardness and high-speed cutting performance. By vanadium content, products are classified into Low-Vanadium Type (<3%), Medium-Vanadium Type (>3–6%), and High-Vanadium Type (>6%). Higher vanadium levels generally increase the proportion of hard carbides and improve wear resistance, while requiring more careful control of toughness and machinability. By product form, Round Bars, Flat Bars & Plates, and Wire & Strips constitute the principal commercial supply forms, supporting different tool, die, and component manufacturing routes.

Downstream Market Opportunities

Cutting tools represent the most important downstream opportunity for Powder Metallurgy High-Speed Steel. High-performance drills, taps, milling cutters, broaches, gear-cutting tools, and complex form tools require strong wear resistance, toughness, and cutting-edge stability, making them important applications for premium PM-HSS grades. Cold work and plastic processing tooling place greater emphasis on balancing wear resistance, compressive strength, and dimensional stability. As machining of difficult alloys, high-strength steels, and precision components expands, PM-HSS materials capable of reducing tool changes and improving process consistency have further penetration potential.

Regional Insights

Europe, Japan, and North America have established PM-HSS industrial bases with long-standing capabilities in high-end grade development, gas atomization, HIP processing, and qualification with advanced tool customers. China has accelerated the industrialization of Powder Metallurgy High-Speed Steel, with Tiangong International, Heye Special Steel, and specialized material producers establishing commercial supply. The Chinese market is gradually evolving from heavy dependence on imported high-end materials toward a structure combining domestic high-performance grades with imported products. The scale of Asian manufacturing and ongoing localization of cutting

tools make the region an important area for future market expansion.

Competitive Landscape Analysis

The global Powder Metallurgy High-Speed Steel market has relatively high technical barriers. Erasteel, voestalpine, Carpenter Technology, and established Japanese specialty steel manufacturers maintain mature international supply positions supported by advanced grades, quality consistency, and long-standing customer qualification. Chinese producers including Tiangong International, Heye Special Steel, and Changsha Sapu New Material are expanding localized production and grade portfolios. Future competition is expected to shift from capacity expansion toward powder quality, HIP processing, material cleanliness, grade performance, and application support for high-end cutting tool customers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Powder Metallurgy High-Speed Steel Industry Forecast” looks at past sales and reviews total world Powder Metallurgy High-Speed Steel sales in 2025, providing a comprehensive analysis by region and market sector of projected Powder Metallurgy High-Speed Steel sales for 2026 through 2032. With Powder Metallurgy High-Speed Steel sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Powder Metallurgy High-Speed Steel industry.

This Insight Report provides a comprehensive analysis of the global Powder Metallurgy High-Speed Steel landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Powder Metallurgy High-Speed Steel portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Powder Metallurgy High-Speed Steel market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Powder Metallurgy High-Speed Steel and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Powder Metallurgy High-Speed Steel.

This report presents a comprehensive overview, market shares, and growth opportunities of Powder Metallurgy High-Speed Steel market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Cobalt-Free Type

Low-Cobalt Type (?8%)

High-Cobalt Type (>8%)

Segmentation by Vanadium Content:

Low-Vanadium Type (?3%)

Medium-Vanadium Type (3–6%)

High-Vanadium Type (>6%)

Segmentation by Product Form:

Round Bars

Flat Bars & Plates

Wire & Strips

Other

Segmentation by Application:

Cutting Tools

Cold Work Tooling

Plastic Processing Tooling

Wear Parts

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Erasteel

voestalpine

Carpenter Technology

Proterial

Daido Steel

NACHI-FUJIKOSHI

Sanyo Special Steel

Tiangong International

Heye Special Steel

Changsha Sapu New Material

Key Questions Addressed in this Report

What is the 10-year outlook for the global Powder Metallurgy High-Speed Steel market?

What factors are driving Powder Metallurgy High-Speed Steel market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Powder Metallurgy High-Speed Steel market opportunities vary by end market size?

How does Powder Metallurgy High-Speed Steel break out by Type, by Application?

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