

# **Ammonium Metatungstate Market by Raw Material (Virgin Ore Route, Secondary/Recycled Route), Form (Powder, Aqueous Solution, Crystalline), Grade (Standard Grade, High-Purity Grade, Reagent Grade), Application, End-use Industry, and Region - Global Forecast to 2030**

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## **Abstracts**

The ammonium metatungstate market is projected to grow from USD 0.90 billion in 2025 to USD 1.16 billion by 2030, at a CAGR of 5.2% during the forecast period.

The reagent grade of ammonium metatungstate (AMT) is expected to be the second-fastest-growing grade in terms of value during the forecast period, driven by its expanding use in research, analytical applications, and high-precision industrial processes. Reagent-grade AMT offers superior purity and chemical consistency, making it suitable for laboratory-scale synthesis, catalyst development, and advanced material research where contamination control is critical. Its demand is rising, particularly in academic and industrial R&D sectors, as well as in niche applications such as electronics and specialty catalysts, where reproducibility and performance reliability are essential. Although high-purity or electronic-grade AMT dominates in certain high-tech segments, reagent-grade material continues to gain traction due to its balanced cost, availability, and quality specifications, positioning it as a key intermediate choice between technical and ultra-high-purity grades in the evolving AMT market landscape.

“In terms of value, catalyst is expected to be the fastest-growing in the overall AMT market during the forecast period.”

This growth is supported by the accelerating global transition toward cleaner fuels and energy-efficient chemical processes. AMT serves as a critical precursor for manufacturing tungsten-based catalysts used in hydroprocessing, oxidative coupling, and selective catalytic reduction (SCR) systems. Its unique combination of acidity, oxidation potential, and thermal stability enhances catalytic performance, making it highly effective in refining, petrochemical, and environmental applications. Beyond traditional hydrocracking and desulfurization uses, the material is increasingly being explored for green chemistry innovations such as biomass conversion, CO<sub>2</sub> utilization, and ammonia decomposition for hydrogen production. These emerging sustainable technologies are creating new, high-value demand streams for AMT-derived catalysts. Additionally, as refineries and chemical plants modernize to meet stricter emission norms and process efficiency goals, the shift toward tungsten-based catalyst systems is expected to further accelerate the growth of this application segment.

“During the forecast period, the chemical end-use industry is projected to register the fastest growth during the forecast period.”

Driven by the rising adoption of tungsten-based intermediates in advanced chemical synthesis and catalytic processes. AMT is increasingly being used as a key ingredient in the manufacture of high-performance catalysts, specialty tungsten compounds, and functional oxides that serve as building blocks for a variety of downstream products. The shift toward cleaner and more energy-efficient chemical production is further stimulating demand, as AMT enables high activity and selectivity in catalytic reactions, reducing waste and improving process economics. Additionally, growth in fine and specialty chemical manufacturing, including advanced coatings, polymer modifiers, and environmental catalysts, is creating new opportunities for AMT utilization. Many chemical producers are also investing in closed-loop tungsten recovery systems, using AMT as a recyclable and environmentally compatible intermediate, aligning with sustainability and circular economy trends. This combination of performance, versatility, and environmental compliance positions the chemical industry as a key growth driver for the global AMT market.

“The AMT market in Europe is projected to register the second-largest market share during the forecast period.”

This growth is supported by the region’s strong industrial base, advanced technological capabilities, and growing emphasis on sustainable manufacturing. The region hosts several leading tungsten chemical producers and refiners, particularly in Germany, Austria, and the UK, which have well-established infrastructure for high-purity tungsten

processing. Europe's mature petrochemical, automotive, and aerospace industries are key consumers of AMT-based catalysts and materials, driven by strict environmental and performance standards. The ongoing transition toward low-emission fuels and the adoption of circular economy models are encouraging refiners and chemical manufacturers to integrate AMT in catalyst systems and tungsten recovery loops. Additionally, robust R&D initiatives, supported by the European Green Deal and investments in clean energy technologies, are fostering innovation in tungsten-based catalysts and electronic materials. This combination of regulatory push, technological advancement, and industrial maturity positions Europe as a strategically important and stable market, maintaining its status as the second-largest regional hub in the global AMT landscape.

This study has been validated through primary interviews with industry experts globally. These primary sources have been divided into the following three categories:

By Company Type: Tier 1 - 60%, Tier 2 - 20%, and Tier 3 - 20%

By Designation: C Level - 33%, Director Level - 33%, and Managers - 34%

By Region: North America - 20%, Europe - 25%, Asia Pacific - 25%, Middle East & Africa - 15%, and South America - 15%

The report provides a comprehensive analysis of company profiles:

Prominent companies in this market include H.C. Starck Tungsten GmbH (Germany), Global Tungsten & Powders (US), Masan High-Tech Materials Corporation (Vietnam), Ganzhou Grand Sea Tungsten Co., Ltd. (China), Ereztech LLC (US), Ganzhou CF Tungsten Co., Ltd (China), United Wolfram (India), ATT Advanced Elemental Materials Co., Ltd. (US), Noah Chemicals (US), and North Metal & Chemical Co. (US).

## **Research Coverage**

This research report categorizes the AMT market by raw material (virgin ore route, secondary/recycled route), form (powder, aqueous solution, crystalline), grade (standard grade, high-purity grade, reagent grade), application (catalysts, pigments, metal finishing, x-ray shielding, analytical chemistry, glass & ceramic production, other applications), end-use industry (chemical, electronics, medical, aerospace & defense, metallurgy, other end-use industries), and region (North America, Europe, Asia Pacific,

Middle East & Africa, and South America). The scope of the report includes detailed information about the major factors influencing the growth of the AMT market, such as drivers, restraints, challenges, and opportunities. A thorough examination of the key industry players has been conducted in order to provide insights into their business overview, solutions, and services, key strategies, contracts, partnerships, and agreements. Product launches, mergers and acquisitions, and recent developments in the AMT market are all covered. This report includes a competitive analysis of upcoming startups in the AMT market ecosystem.

### **Reasons to buy this report:**

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall AMT market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

### **The report provides insights on the following pointers:**

Analysis of key drivers (regulatory compliance in end-use industries, technological advancement, and performance superiority), restraints (volatility in raw material prices and technical complexity in downstream applications), opportunities (high growth technology sector and circular economy and recycling), and challenges (supply chain vulnerabilities)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and service launches in the AMT market.

Market Development: Comprehensive information about lucrative markets – the report analyses the AMT market across varied regions.

Market Diversification: Exhaustive information about services, untapped geographies, recent developments, and investments in the AMT market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like H.C. Starck Tungsten GmbH (Germany), Global Tungsten & Powders (US), Masan High-Tech

Materials Corporation (Vietnam), Ganzhou Grand Sea Tungsten Co., Ltd. (China), Ereztech LLC (US), Ganzhou CF Tungsten Co., Ltd. (China), United Wolfram (India), ATT Advanced Elemental Materials Co., Ltd. (US), Noah Chemicals (US), and North Metal & Chemical Co. (US).

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