

China Tungsten Resources Export Research Report 2025-2034

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Abstracts

Tungsten is a naturally occurring rare metal that exists almost entirely in the form of a combination with other elements. It has the highest melting point among known metals and has extremely high hardness and excellent heat and corrosion resistance. The main forms of tungsten include metallic tungsten, tungsten carbide, tungsten oxide and tungsten alloys. It plays an important role in modern industry and is widely used in aerospace, military industry, electronics, machinery manufacturing and other fields. It has irreplaceable value.

About half of all tungsten is used to produce hard materials (i.e. tungsten carbide), the rest is used to produce alloys and steels, and less than 10% is used in other compounds.

China is the world's largest tungsten producer and exporter. According to data from the United States Geological Survey, the world's proven tungsten reserves in 2023 were about 4.4 million tons, of which nearly half are in China. According to CRI analysis, China's tungsten production accounts for more than 80% of the world's total. Other tungsten producing countries in the world mainly include Vietnam, Russia and other countries.

On December 3, 2024, the Ministry of Commerce of China issued an announcement, announcing the prohibition of dual-use items from being exported to U.S. military users or for military purposes. In principle, the export of dual-use items such as gallium, germanium, tungsten, and superhard materials to the United States will not be permitted in order to safeguard national security and interests. The announcement has been officially implemented since December 3, 2023. If export operators violate the above provisions and transfer or provide relevant dual-use items originating in the People's Republic of China to organizations and individuals in the United States, they will be held accountable in accordance with the law.

Tungsten materials are closely related to superhard materials. For example, tungsten

carbide is a core member in the field of superhard materials. Its hardness is second only to diamond and cubic boron nitride (CBN), but it has higher chemical stability and wear resistance, and is widely used in the manufacture of cemented carbide tools. In addition, tungsten powder and tungsten oxide are also important raw materials for the manufacture of superhard materials. Their high hardness and high strength provide efficient solutions for modern industry.

From 2019 to 2023, China's tungsten resource exports showed a downward trend. According to CRI analysis, in 2023, China's tungsten resource exports have reached 19,828 tons, a year-on-year decrease of 27.4%; the export value of tungsten resources was about US\$749 million, a year-on-year decrease of 27.0%.

From 2019 to October 2024, the average export price of China's tungsten resources generally showed a fluctuating upward trend. According to CRI analysis, from 2019 to October 2024, the average export price of China's tungsten resources rose from US\$5.66 per kilogram to US\$13.54 per kilogram, reaching a peak in recent years. 2019-2023 China has exported tungsten resources to about 150 countries and regions around the world, with a relatively diversified export structure. Tungsten resource exports are diverse, including tungsten carbide, tungsten trioxide, tungsten powder, tungsten iron, various tungsten oxides and hydroxides, tungsten products, etc., among which the most important categories are tungsten carbide, tungsten trioxide and tungsten powder.

According to CRI analysis, Japan, South Korea, the Netherlands, the United States, and Germany are the main destinations for China's tungsten resource exports, divided by export value. In 2023, South Korea became the country with the largest export volume of Chinese tungsten resources. In 2023, China has exported 4,988 tons of tungsten resources to South Korea, accounting for 25.2% of China's total tungsten resource exports that year. In 2023, China exported tungsten resources to South Korea for approximately US\$174.97 million, accounting for 23.4% of the total export value. Since China began to impose stricter controls on the export of tungsten-related resources such as superhard materials from December 3, 2024, CRI predicts that in 2025, China's tungsten resource export volume and value will decline significantly compared with 2023-2024, and the export structure and average price will also change significantly.

Topics covered:

The Export and Main Destinations of Tungsten Resources in China (2019-2023)

Main Driving Forces and Market Opportunities for China's Tungsten Resource Exports

What are the main driving forces, challenges and opportunities for China's tungsten resource exports during the forecast period of 2025-2034?

Which companies are the main players in China's tungsten resource export market and what are their competitive benchmarks?

What is the expected revenue from China's tungsten resource export market during the forecast period of 2025-2034?

What strategies have the major players in the market adopted to increase their market share in the industry?

Which segment of China's tungsten resource export market is expected to dominate the market in 2034?

What are the competitive advantages of the main players in China's tungsten resource export market?

What are the main limiting factors that inhibit the growth of China's tungsten resource exports?

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