

Indexable Inserts Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Insert Shape (Round, Square, Triangle, Rhombic, and Others), Application (Milling, Drilling, Turning, Threading, and Others), Size (Up to 10 mm, 10-20 mm, and Above 20 mm), Insert Material (Carbide, Ceramic and Composites, PCD Inserts, and Others), Industry (Aerospace and Defense, General Industry, Oil and Gas, Power Generation, Automotive, Electric and Electronics, Medical, and Others), and Geography

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Abstracts

The indexable inserts market size was valued at US\$ 9.02 billion in 2023 and is expected to reach US\$ 14.57 billion by 2031; it is estimated to record a CAGR of 6.2% from 2023 to 2031.

The indexable inserts market is segmented into five major regions—North America, Europe, Asia Pacific (APAC), the Middle East & Africa (MEA), and South America. Asia Pacific dominated the market in 2023, followed by Europe and North America, respectively. The indexable inserts market in Asia Pacific is segmented into the Australia, China, Japan, South Korea, India, and Rest of Asia Pacific. The region consists of various developing economies such as India, China, Thailand, Vietnam, Singapore, Taiwan, and New Zealand. These countries are experiencing a gradual increase in the adoption of advanced manufacturing technologies. Furthermore, the availability of low labor costs, low taxes and tariffs, and a strong business ecosystem

are attracting international players in the manufacturing industry to expand their production facilities in this region. In November 2022, Kennametal Inc. announced the opening of its new metal cutting insert manufacturing facility in Bengaluru, India. With this strategic development, the company aims to enhance its capabilities and capacity to meet the growing demand in the Asia Pacific indexable inserts market.

In addition, the growing automation and digitalization are propelling the growth of the modernized and standardized manufacturing sector in Asia Pacific, which is expected to fuel the demand for metalworking machines and cutting tools. Thus, the growing manufacturing industry in Asia Pacific is projected to offer key lucrative opportunities for metalworking machinery and cutting tools, thereby fueling the indexable inserts market growth in the coming years. Moreover, the rapid growth of electronics, electric vehicles, aviation, manufacturing, and other industries is anticipated to fuel the demand for cutting tools in threading, cutting, grooving, and other operations in the industries mentioned above.

As per the World Steel Association – AISBL, China was the largest steel-producing country in the world in 2023, with 1,019.1 million tonnes of output. Several key players in the metal production industries are headquartered in the country; these include Jianglong Group, China Baowu Group, ShaGang Group, and Shougang Group, which contribute significantly to the growth of its metal production industry. Various enterprises across the world are focusing on expanding their metalworking capabilities in the proximity of metal manufacturing businesses in China to reduce costs of transportation and ease import procedures. The growing metal manufacturing industry in China thus bolsters the demand for metalworking machines, including cutting tools such as indexable inserts.

Based on insert shape, the global indexable inserts market is bifurcated into round, square, triangle, rhombic, and others. The rhombic segment dominated the market for insert shape in 2023 owing to rise in utilization of rhombic indexable inserts to fabricate or cut for roughing and finishing aluminum alloy-based products. Aluminum parts are used across a variety of industries, including aerospace, automotive, heavy industries, and electronics and semiconductors, which use aluminum alloys for their respective applications. Moreover, the increasing adoption of aluminum/aluminum alloy-based products across different industries is one of the major factors driving the growth of the indexable inserts market for the rhombic segment. In addition, triangle indexable inserts are used for operations such as turning, facing, boring, copy turning, and simple shaping. There exists a wide variety of tool holders with various lead angles. Triangles are cost-effective because they have six cutting edges. T-style inserts are also the best

choice for general boring since they insert firmly into the pocket of the boring bar, and there is more side clearance between the insert and workpiece bore, which minimizes the chances of a chip jam. However, the work done using a 60° edge will not be as strong as work done using 80° diamond inserts.

Sandvik AB; Kennametal Inc.; Iscar Ltd.; Paul Horn GmbH; Kyocera Corporation; Ingersoll; Zhuzhou Cemented Carbide Cutting Tools Co., Ltd.; MITSUBISHI MATERIALS Corporation; Guhring, Inc.; YG-1 Co., Ltd.; Ceratizit Group; and Boehlerit GmbH & Co.KG are among the key indexable inserts market players that are profiled in this market study.

The overall indexable inserts market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the indexable inserts market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the indexable inserts market.

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16. APPENDIX

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