

EU & UK Powder Metallurgy Market Research Report by Material Type (Nickel, Cobalt, Iron, Steel, Aluminum, Others), by Manufacturing Process [Conventional Press & Sinter, Additive Manufacturing (AM), Hot Isostatic Pressing (HIP), Metal Injection Molding (MIM), Surfacing / Coating, Brazing, Others], by End-Use Industry (Automotive, Aerospace & Defense, Healthcare, Industrial Machinery, Electronics & Electrical, Energy & Power, Consumer Goods, Others), and by Country [EU (Germany, Spain, Italy, France, Sweden, Poland, Czech Republic, Rest of Europe), UK] Forecast till 2035

Market Report | 2025-10-03 | 160 pages | Market Research Future

AVAILABLE LICENSES:

- Single User Price \$2950.00
- Enterprisewide Price \$3950.00
- \$5250.00

Report description:

The EU & UK Powder Metallurgy Market is projected to reach USD 5,569.12 million by 2035, expanding at a CAGR of 6.2% from 2025 to 2035. Powder Metallurgy is a technique of metal manufacturing through forming metallic parts by compressing the metal powder into a certain shape and then heating the compressed area to bond the metal powder particles. The method is characterized by high accuracy, low waste, and the possibility of producing complicated parts.

The powder metallurgy (PM) sector is being substantially energized by the increasing demand for electric vehicles (EVs) all over Europe. As automakers are pursuing designs that are not only lighter but also more energy-efficient, the role of PM, which is capable of manufacturing ultra-precise components such as gears, bearings, and motor cores with hardly any waste, is invaluable

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

for the production of clean EVs.

Key Company Development

In 2024, Sandvik AB consolidated its powder metallurgy program with two major product introductions. In September, the company presented Osprey HWTS 50, a lean hot-work tool steel powder that provides excellent printability, tempering resistance, and thermal conductivity for additive manufacturing and metal injection molding. Earlier in the year, in March, Sandvik unveiled Osprey C18150 (CuCrZr), a copper-based powder that achieves high strength, electrical, and thermal performance for applications in aerospace, automotive, and electronics industries.

Major Players

Major players in the EU and UK power metallurgy market include Sandvik AB, GKN Powder Metallurgy, Hoganas AB, ATI Inc., Carpenter Technology Corporation, Rio Tinto, Kennametal, Erasteel, AMES Group, and Schunk Sintermetalltechnik GmbH.

Key Report Attributes

- Market Size 2024: USD 2,821.34 Million
- Market Size 2035: USD 5,569.12 Million
- CAGR (2025-2035): 6.2%
- Base Year: 2024
- Market Forecast Period: 2025-2035

Market Segmentations Growth

- By Material Type: Nickel - 28.8%, Cobalt - 18.6%.
- By Manufacturing Process: Conventional Press & Sinter - 62.2%, Additive Manufacturing - 5.6%.
- By End-Use Industry: Automotive - 61.3%, Aerospace & Defense - 22.0%.

Table of Contents:

TABLE OF CONTENTS

1 EXECUTIVE SUMMARY	. 19
2 MARKET INTRODUCTION	. 24
2.1 DEFINITION	24
2.2 SCOPE OF THE STUDY	24
2.3 RESEARCH OBJECTIVE	24
2.4 MARKET STRUCTURE	25
3 RESEARCH METHODOLOGY	26
3.1 OVERVIEW	26
3.2 DATA FLOW	28
3.2.1 DATA MINING PROCESS	. 28
3.3 PURCHASED DATABASE:	. 29
3.4 SECONDARY SOURCES:	30
3.4.1 SECONDARY RESEARCH DATA FLOW:	. 31
3.5 PRIMARY RESEARCH:	. 32
3.5.1 PRIMARY RESEARCH DATA FLOW:	. 33
3.5.2 PRIMARY RESEARCH: NUMBER OF INTERVIEWS CONDUCTED	. 34
3.6 APPROACHES FOR MARKET SIZE ESTIMATION:	. 34
3.6.1 CONSUMPTION & NET TRADE APPROACH	. 34
3.7 DATA FORECASTING	. 35
3.7.1 DATA FORECASTING TECHNIQUE	35

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

3.8 DATA MODELING	36
3.8.1 MICROECONOMIC FACTOR ANALYSIS:	36
3.8.2 DATA MODELING:	. 37
3.9 TEAMS AND ANALYST CONTRIBUTION	. 38
4 MARKET DYNAMICS	41
4.1 INTRODUCTION	. 41
4.2 MARKET TRENDS AND GROWTH AFFECTING FACTORS	. 41
4.3 DRIVERS	. 42
4.3.1 GROWING DEMAND FROM ELECTRIC VEHICLE INDUSTRY	42
4.3.2 GROWTH OF ADDITIVE MANUFACTURING (AM)	. 43
4.4 RESTRAINTS	45
4.4.1 HIGH RAW MATERIAL COSTS	45
4.4.2 COMPETITION FROM ALTERNATIVE PROCESSES	. 45
4.5 OPPORTUNITY	. 47
4.5.1 ADVANCING DEMAND FROM ELECTRONICS & ELECTRICAL INDUSTRY	. 47
4.5.2 DEFENSE AND AEROSPACE SECTOR DEVELOPMENT	. 48
4.6 IMPACT ANALYSIS OF RUSSIA-UKRAINE WAR	. 49
4.7 IMPACT ANALYSIS OF TRUMP 2.0	50
5 MARKET FACTOR ANALYSIS	51
5.1 SUPPLY CHAIN ANALYSIS	. 51
5.1.1 PARTICIPANTS	. 51
5.1.1.1 RAW MATERIALS SUPPLIERS	51
5.1.1.1.1 RAW MATERIAL SELECTION & PROCUREMENT	. 51
5.1.1.1.2 QUALITY AND PURITY STANDARDS	. 51
5.1.1.1.3 LIST OF RAW MATERIAL SUPPLIERS (COMPANY NAME, PRESENCE, AND CONTACT DETAILS)	. 52
5.1.1.2 MANUFACTURERS	52
5.1.1.2.1 PRODUCTION PROCESS	52
5.1.1.2.2 LIST OF MANUFACTURERS (COMPANY NAME, PRESENCE, AND CONTACT DETAILS)	. 53
5.1.1.3 DISTRIBUTORS	. 54
5.1.1.3.1 LOGISTICS	54
5.1.1.3.2 SALES AND MARKETING STRATEGIES	. 54
5.1.1.3.3 LIST OF DISTRIBUTORS (COMPANY NAME, PRODUCT TYPE, PRESENCE, AND CONTACT DETAILS)	. 54
5.1.1.4 END-USERS	55
5.1.1.4.1 CUSTOMER NEEDS, PREFERENCES, PAIN POINTS & APPLICATIONS	55
5.1.1.4.2 LIST OF POTENTIAL CUSTOMERS (COMPANY NAME, PRESENCE, CONTACT DETAILS, END-USE INDUSTRY)	55
5.2 PORTER'S FIVE FORCES MODEL	. 56
5.2.1 BARGAINING POWER OF SUPPLIERS	. 57
5.2.2 BARGAINING POWER OF BUYERS	57
5.2.3 THREAT OF NEW ENTRANTS	. 57
5.2.4 THREAT OF SUBSTITUTES	57
5.2.5 INTENSITY OF RIVALRY	58
5.3 PRICING ANALYSIS, 2019-2035 BY COUNTRY (USD/TONS)	. 58
5.3.1 FACTORS AFFECTING PRICES	. 58
5.4 TECHNOLOGICAL ADVANCEMENTS	. 59
5.4.1 ADDITIVE MANUFACTURING (AM) INTEGRATION	. 59
5.4.2 ADVANCED POWDER PRODUCTION METHODS	. 59
5.4.3 AUTOMATION & INDUSTRY 4.0 INTEGRATION	59

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.4.4 SINTERING TECHNOLOGY UPGRADES	. 60
5.4.5 ECO-FRIENDLY PROCESSING	. 60
5.5 REGULATORY FRAMEWORK	. 60
5.6 CERTIFICATION AND STANDARDS	61
5.7 BROAD LEVEL GAP ANALYSIS	61
5.7.1 BY MATERIAL TYPE	61
5.7.2 BY END-USE INDUSTRY	. 61
5.8 R&D UPDATE	62
5.8.1 CURRENT SCENARIO	62
5.8.2 FUTURE ROADMAP	. 62
5.8.3 NOVEL APPLICATIONS	. 62
5.8.4 KEY DEVELOPMENTS	63
5.9 PESTLE ANALYSIS	. 63
6 EU & UK POWDER METALLURGY MARKET, BY MATERIAL TYPE	65
6.1 INTRODUCTION	. 65
6.2 NICKEL	. 65
6.3 COBALT	65
6.4 IRON	65
6.5 STEEL	66
6.6 ALUMINIUM	. 66
6.7 OTHERS	66
7 EU & UK POWDER METALLURGY MARKET, BY MANUFACTURING PROCESS	69
7.1 INTRODUCTION	. 69
7.2 CONVENTIONAL PRESS & SINTER	. 69
7.3 ADDITIVE MANUFACTURING (AM)	. 69
7.4 HOT ISOSTATIC PRESSING (HIP)	70
7.5 METAL INJECTION MOLDING (MIM)	70
7.6 SURFACING / COATING	70
7.7 BRAZING	70
7.8 OTHERS	71
8 EU & UK POWDER METALLURGY MARKET, BY END-USE INDUSTRY	. 73
8.1 INTRODUCTION	. 73
8.2 AUTOMOTIVE	73
8.3 AEROSPACE & DEFENSE	73
8.4 HEALTHCARE	73
8.5 INDUSTRIAL MACHINERY	74
8.6 ELECTRONICS & ELECTRICAL	74
8.7 ENERGY & POWER	74
8.8 CONSUMER GOODS	75
8.9 OTHERS	75
9 EU & UK POWDER METALLURGY MARKET, BY REGION	77
9.1 INTRODUCTION	. 77
9.2 EU	. 78
9.2.1 GERMANY	83
9.2.2 SPAIN	86
9.2.3 ITALY	. 89
9.2.4 FRANCE	. 92

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.2.5 SWEDEN	95
9.2.6 POLAND	. 98
9.2.7 CZECH REPUBLIC	. 101
9.2.8 REST OF EU	104
9.3 UK	107
10 COMPETITIVE LANDSCAPE	111
10.1 INTRODUCTION	. 111
10.2 COMPETITION DASHBOARD	. 112
10.3 COMPANY MARKET SHARE ANALYSIS, 2024 (%)	112
10.4 COMPETITIVE BENCHMARKING	113
10.5 LEADING PLAYERS IN TERMS OF THE NUMBER OF DEVELOPMENTS IN THE POWDER METALLURGY (PM) MARKET	114
10.6 LIST OF KEY PLAYERS	. 114
10.7 COMPARATIVE ANALYSIS: KEY PLAYERS FINANCIAL, 2024	. 115
10.8 KEY DEVELOPMENTS & GROWTH STRATEGIES	116
10.8.1 NEW PRODUCT LAUNCH/SERVICE DEPLOYMENT	. 116
10.8.2 INVESTMENT	. 116
11 COMPANY PROFILES	117
11.1 SANDVIK AB	. 117
11.1.1 COMPANY OVERVIEW	. 117
11.1.2 FINANCIAL OVERVIEW	118
11.1.3 PRODUCTION CAPACITY AND UTILIZATION RATE	118
11.1.4 PRODUCTS OFFERED	118
11.1.5 KEY DEVELOPMENTS	122
11.1.6 SWOT ANALYSIS	123
11.1.7 KEY STRATEGY	. 123
11.2 GKN POWDER METALLURGY	124
11.2.1 COMPANY OVERVIEW	. 124
11.2.2 FINANCIAL OVERVIEW	125
11.2.3 PRODUCTION CAPACITY AND UTILIZATION RATE	125
11.2.4 PRODUCTS OFFERED	126
11.2.5 KEY DEVELOPMENTS	127
11.2.6 SWOT ANALYSIS	127
11.2.7 KEY STRATEGY	. 127
11.3 HOGANAS AB	. 128
11.3.1 COMPANY OVERVIEW	. 128
11.3.2 FINANCIAL OVERVIEW	129
11.3.3 PRODUCTION CAPACITY AND UTILIZATION RATE	129
11.3.4 PRODUCTS OFFERED	129
11.3.5 KEY DEVELOPMENTS	130
11.3.6 SWOT ANALYSIS	131
11.3.7 KEY STRATEGY	. 131
11.4 ATI INC.	132
11.4.1 COMPANY OVERVIEW	. 132
11.4.2 FINANCIAL OVERVIEW	133
11.4.3 PRODUCTION CAPACITY AND UTILIZATION RATE	133
11.4.4 PRODUCTS OFFERED	134
11.4.5 KEY DEVELOPMENTS	135

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.4.6 SWOT ANALYSIS	135
11.4.7 KEY STRATEGY	. 136
11.5 CARPENTER TECHNOLOGY CORPORATION	. 137
11.5.1 COMPANY OVERVIEW	. 137
11.5.2 FINANCIAL OVERVIEW	138
11.5.3 PRODUCTION CAPACITY AND UTILIZATION RATE	138
11.5.4 PRODUCTS OFFERED	139
11.5.5 KEY DEVELOPMENTS	139
11.5.6 SWOT ANALYSIS	140
11.5.7 KEY STRATEGY	. 140
11.6 RIO TINTO	141
11.6.1 COMPANY OVERVIEW	. 141
11.6.2 FINANCIAL OVERVIEW	142
11.6.3 PRODUCTION CAPACITY AND UTILIZATION RATE	142
11.6.4 PRODUCTS OFFERED	143
11.6.5 KEY DEVELOPMENTS	144
11.6.6 SWOT ANALYSIS	145
11.6.7 KEY STRATEGY	. 145
11.7 KENNAMETAL	146
11.7.1 COMPANY OVERVIEW	. 146
11.7.2 FINANCIAL OVERVIEW	147
11.7.3 PRODUCTION CAPACITY AND UTILIZATION RATE	147
11.7.4 PRODUCTS OFFERED	148
11.7.5 KEY DEVELOPMENTS	148
11.7.6 SWOT ANALYSIS	149
11.7.7 KEY STRATEGY	. 149
11.8 ERASTEEL	. 150
11.8.1 COMPANY OVERVIEW	. 150
11.8.2 FINANCIAL OVERVIEW	150
11.8.3 PRODUCTION CAPACITY AND UTILIZATION RATE	150
11.8.4 PRODUCTS OFFERED	150
11.8.5 KEY DEVELOPMENTS	151
11.8.6 SWOT ANALYSIS	151
11.8.7 KEY STRATEGY	. 151
11.9 AMES GROUP	. 152
11.9.1 COMPANY OVERVIEW	. 152
11.9.2 FINANCIAL OVERVIEW	152
11.9.3 PRODUCTION CAPACITY AND UTILIZATION RATE	152
11.9.4 PRODUCTS OFFERED	153
11.9.5 KEY DEVELOPMENTS	153
11.9.6 SWOT ANALYSIS	154
11.9.7 KEY STRATEGY	. 154
11.10 SCHUNK SINTERMETALLTECHNIK GMBH	155
11.10.1 COMPANY OVERVIEW	. 155
11.10.2 FINANCIAL OVERVIEW	155
11.10.3 PRODUCTION CAPACITY AND UTILIZATION RATE	155
11.10.4 PRODUCTS OFFERED	155

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.10.5 KEY DEVELOPMENTS	155
11.10.6 SWOT ANALYSIS	156
11.10.7 KEY STRATEGY	. 156
11.11 DATA CITATIONS	. 158

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

EU & UK Powder Metallurgy Market Research Report by Material Type (Nickel, Cobalt, Iron, Steel, Aluminum, Others), by Manufacturing Process [Conventional Press & Sinter, Additive Manufacturing (AM), Hot Isostatic Pressing (HIP), Metal Injection Molding (MIM), Surfacing / Coating, Brazing, Others], by End-Use Industry (Automotive, Aerospace & Defense, Healthcare, Industrial Machinery, Electronics & Electrical, Energy & Power, Consumer Goods, Others), and by Country [EU (Germany, Spain, Italy, France, Sweden, Poland, Czech Republic, Rest of Europe), UK] Forecast till 2035

Market Report | 2025-10-03 | 160 pages | Market Research Future

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Price	\$2950.00
	Enterprisewide Price	\$3950.00
		\$5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-03"/>
		Signature	<input type="text"/>