



# EUROPEAN CUTTING TOOLS ASSOCIATION

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## Press Information

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## Recycling Key to Europe's Carbide Supply

### ECTA calls for coordinated European action to secure tungsten supply

**Graz, May 8, 2026** – Securing the supply of tungsten has become a defining challenge for Europe's metalworking industry. "Recycling is now decisive: returning cemented carbide to the European cycle is a key lever for supply security and competitiveness," said Federico Costa, President of ECTA – the European Cutting Tools Association, at the European Cutting Tools Conference (ECTC) in Graz.

China continues to control more than 80 percent of global tungsten production and processing and is increasingly using export restrictions as an instrument of industrial policy. European industry is therefore facing not only sharp price increases but now also growing uncertainty over the availability of this critical raw material.

### Call for coordinated action across the value chain

To strengthen Europe's resilience, ECTA calls for coordinated action across industry and policymaking. Companies along the entire value chain must ensure that tungsten-containing scrap is systematically returned to European recycling loops, keeping this strategic raw material within the European industrial base. Investment in recycling and processing infrastructure must expand in parallel to increase capacity and meet rising demand.

### Recycling systems under increasing pressure

Around 50 percent of cemented carbide used in Europe already originates from recycling, underlining the importance of established circular systems. However, these systems are under growing strain: European processing capacity is approaching its limits while demand for carbide scrap continues to rise globally, leaving even a strong circular economy unable to fully meet Europe's requirements.

A broader set of measures is therefore required, including the development of additional primary tungsten sources to reduce dependencies and diversify supply.

### **Competitive conditions needed to unlock recycling potential**

This must be complemented by competitive energy prices and less complex, easier-to-implement rules, applied more consistently across Europe, to support investment and enable efficient recycling at scale, as complex regulatory requirements and inconsistent interpretation in practice limit the effective use of recycling potential in permitting, classification and processing. “For example, treating high-grade carbide scrap in the same way as oil- and coolant-contaminated sludge is not justified,” Costa emphasized. “These material streams differ significantly in their properties and risk profiles and require differentiated handling.” While contaminated sludge requires specific measures to address environmental and health concerns, carbide scrap represents a valuable raw material that can be safely and efficiently reintegrated into the industrial cycle.

Action is needed to prevent overly complex rules from wasting recycling potential – while significant volumes of scrap continue to leave Europe and further tighten supply. Ensuring a secure tungsten supply is therefore a shared responsibility of industry and policymakers.

**The European Cutting Tools Association (ECTA) is the European association of cutting tool and clamping technology manufacturers. ECTA regularly organizes triennial world conferences, yearly European conferences and branch events at various locations.**