June 5, 2026

The Honorable Howard Lutnick
Secretary of Commerce
U.S. Department of Commerce
1401 Constitution Avenue, NW
Washington, DC 20230

RE: Urgent Action Needed to Stabilize Global Tungsten, AMT, and APT Supply Chains

ETTAC Recommendation 2026-13

Dear Mr. Secretary,

The Environmental Technologies Trade Advisory Committee (ETTAC) is a federally established committee whose purpose is to advise on the policies and procedures of the U.S. government that affect the exports of environmental technology, goods and services. In this capacity, we are writing to you about urgent action that is needed to stabilize the global tungsten market.

Executive Summary

ETTAC submits this recommendation to address the severe instability of the tungsten market, including Ammonium Metatungstate (AMT) and Ammonium Paratungstate (APT), as tungsten in various forms is a critical material for the U.S. environmental technology industry, as well as the U.S. aerospace and defense industries. The United States does not currently mine tungsten commercially; the last domestic mine closed in 2015.

China's tightening export controls have reduced the availability of refined tungsten products causing severe price escalation and supply shortages, resulting in significant strategic and commercial vulnerability. These disruptions threaten U.S. national security, undermine domestic clean air compliance for power growth, and erode the competitiveness of U.S. environmental technology exporters.

ETTAC urges the Department of Commerce to take immediate and urgent action to stabilize supply, diversify global sources, and support domestic and allied-nation production.

Background

Tungsten is on the 2025 U.S. Critical Minerals list and is essential to aerospace and defense systems (high-temperature alloys, penetrators, turbine components), environmental technologies, semiconductors, advanced coatings, precision manufacturing, and is used by utilities and data centers for power growth. Specifically, tungsten is used in industries and products such as Selective Catalytic Reduction (SCR) catalysts for emissions control; drill bits, which can be used for water well drilling; carbide mechanical seals in grinders, pulverizers, and shredders for municipal solid waste; radiation shielding in nuclear waste management; and trioxide (WO_3), a visible-light-active photocatalyst used in advanced oxidation processes (AOPs) to degrade persistent organic contaminants in water. Because of widespread use across sectors, lack of tungsten availability could present an operational risk across infrastructure systems.

AMT and APT are the primary refined intermediates used to produce tungsten oxides, carbides, SCR catalysts and other environmental products. The United States relies heavily on imports, with China historically supplying most global refined tungsten. Substitutes are not readily available.

Issue: Global Supply Contraction and Price Escalation

Over the past 18 months, China has imposed stricter export licensing, reduced export quotas, and implemented administrative delays affecting APT and AMT shipments. These actions have significantly tightened global supply and increased market prices.

Price Trends (Approximate Market Data)

- APT prices have risen from ~$300 per metric ton unit (mtu) WO_3 in mid-2024 to $3,000/mtu WO_3 in mid-2026, an increase of ~ 900%.[1]
- AMT prices have followed similar trajectories, with U.S. buyers reporting spot increases exceeding 1,000% as well.
- Lead times have expanded from 4–6 weeks to 12–20 weeks, with some suppliers declining new orders.

Impact on U.S. Industry

- Defense contractors face rising costs and procurement delays for tungsten-based components.
- SCR catalyst manufacturers face material shortages, jeopardizing power growth in AI and datacenters.
- U.S. technology exporters are losing competitiveness to foreign firms with better access to Chinese supply.
- The U.S. Government Accountability Office (GAO) and DoD identify tungsten as a high-risk supply chain material with national security implications[2].

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[1] *APT Index from Fast Markets, MB-W-001, Tungsten APT 88.5% WO_3 min cif Rotterdam and Baltimore duty –free, \$/mtu WO_3*

[2] https://www.gao.gov/products/gao-24-107176

Supply Developments and Recycling Opportunities

Several U.S. domestic projects are evaluating the potential of restarting or expanding U.S. tungsten mining but face challenges in capital access, permitting timelines, and refining capacity.

There are also a wide range of U.S. midstream tungsten processors and manufacturers who could expand capacity to benefit and grow domestic supply in the United States to convert tungsten concentrates into intermediate products like APT, tungsten oxides, metal powders, carbides, mill products (rod, wire, sheet), and alloys for defense, aerospace, and industrial tooling.

Because of the lack of U.S. mining, recycled tungsten is the single most important domestic source, accounting for roughly 30–35% of U.S. tungsten consumption. Technical investment focused on expanding U.S. scrap use and reclaiming carbide cutting tools, various steel components and manufacturing wastes is a priority.

Korea, Vietnam and other emerging producers hold significant tungsten reserves but need investment in refining and export infrastructure. Australia, Kazakhstan, Canada and EU partners are also potential contributors to supply diversification.

Recommendations to the Secretary of Commerce

1. **Facilitate Increasing Tungsten Imports from Partners/Allies, Versus Current Dominant Sources, to Restore Predictable Critical Material Flows**

- Request transparency on worldwide supply and export licensing for APT and AMT.
- Encourage stable, rules-based export availability for environmental and defense applications.
- Leverage existing trade dialogues to reduce administrative barriers.

2. **Prioritize Tungsten in Critical-Mineral and Supply-Chain Security Programs**

- Reaffirm tungsten's status as a critical mineral across Commerce, DOE, and DOD programs.
- Expand federal support for domestic refining and processing as well as recycling tungsten to expand U.S. capacity to move those industries outside of China.
- Coordinate with defense procurement to ensure long-term demand signals.

3. Accelerate Non-Chinese Mining and U.S. Midstream Manufacturing and Refining Projects

- Support U.S. focused companies through Export-Import Bank financing, Development Finance Corporation tools, federal loan guarantees, and permitting assistance.
- Encourage long-term offtake agreements between U.S. manufacturers and emerging producers.
- Support U.S. midstream processors and manufacturers with investments in increased capacity for tungsten raw materials, like AMT and other specialty products

4. Build International Partnerships to Expand Global Tungsten Supply

- Engage relevant countries, such as Vietnam, South Korea, Australia, Canadian and EU partners, to coordinate investment in tungsten mining and refining.
- Support joint ventures that increase global AMT/APT production capacity.
- Facilitate joint U.S. industry partnerships for tungsten users and suppliers to address priorities and eliminate bottlenecks.

Request for Response

ETTAC has identified Critical Minerals as a priority for U.S. industry as previously highlighted in the ETTAC's *Recommendation 2025-3: Bolstering U.S. Supplies of Critical Minerals*. We respectfully request a formal written response from the Secretary of Commerce and a proposed action plan detailing how the Department will address Chinese export restrictions, support non-Chinese tungsten and other critical mineral production (including reclaim/recycling), strengthen U.S. supply-chain resilience, and coordinate interagency and international efforts.

Sincerely,

Clare Schulzki

Clare Hessler
ETTAC Chair