



Global and China Synthetic Diamond Industry Report, 2016-2020

Feb.2017

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

At present, China has been the world's biggest monocrystalline diamond producer, with 2015's output accounting for 91% of the global total. In the context of China's slowing economic growth and weakened traditional industrial products market, the output of synthetic diamond fell for two consecutive years, to 15.1 billion karats in 2015, a 10.1% drop from a year ago. In 2016, the output declined about 7.9% to 13.9 billion karats. With industrial transformation and upgrading, China's synthetic diamond market is beginning to pick up. In the next three years, China's output of monocrystalline synthetic diamond is expected to grow at an average annual rate of 1%-5%, to 16.5 billion karats by 2020.

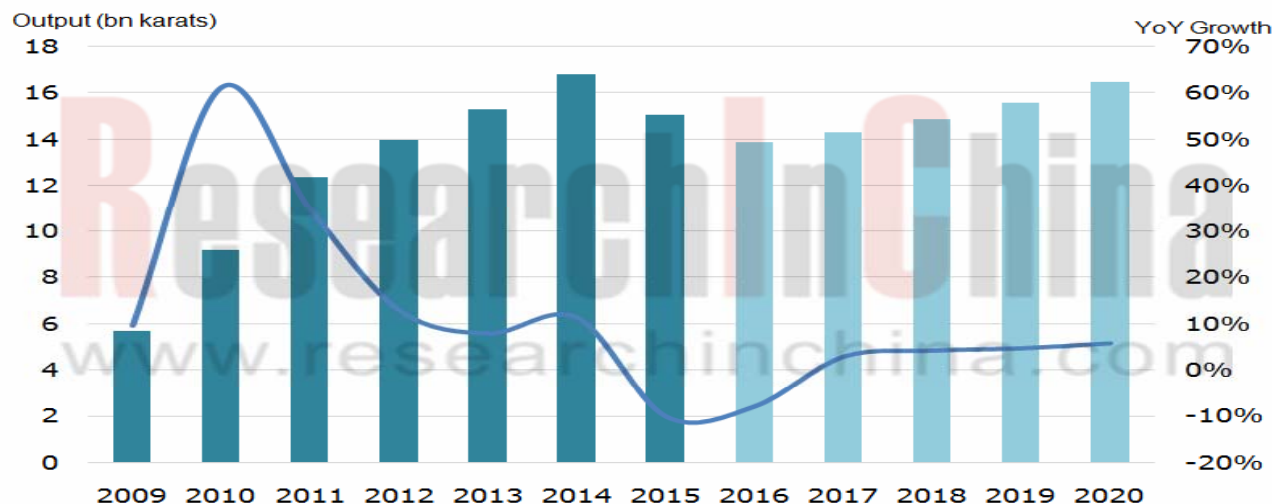
Synthetic diamond is mainly used in diamond tools. In 2015-2016, affected by the downslide in stone material, drilling & mining, and other traditional industries, the overall demand for diamond tools in China declined. By contrast, however, fueled by emerging industries such as PV silicon wafer, sapphire, semiconductor, and electronic information, the demand for diamond wire and other products showed an upsurge. We expect that by 2020 the market demand for PV- and sapphire-used diamond wire will reach 9.075 billion meters and 4.846 billion meters, respectively, a 1.4-fold and 4-fold increase from 2015.

As for competitors, Zhongnan Diamond, Zhengzhou Sino-Crystal Diamond, and Henan Huanghe Whirlwind ranked among the top 3 in Chinese synthetic diamond industry, holding a combined market share of 75.3% (by output) in 2015. Nevertheless, Chinese companies are mainly concentrated in low and mid-end market, while the high-end market is dominated by foreign companies like Element Six, Hyperion, and ILJIN. In the future, as breakthroughs are continuously made in technological R&D, China-made products will gear towards high-end ones. In recent years, in response to the downturn in traditional industrial market, the Chinese synthetic diamond giants such as Zhengzhou Sino-Crystal Diamond, Henan Huanghe Whirlwind, and Zhongnan Diamond have begun to shift their focus to consumer artificial gemstone. Take example for Zhengzhou Sino-Crystal Diamond, which invested RMB4.3 billion in a "7 million karats/a gem-grade diamond" project in September 2015. Moreover, the company also took over KIMLIFE in 2016 to expand the sales channels of diamonds. Apart from the forementioned three giants, scores of enterprises including Exin Diamond and Zhengzhou Lixin Hydraulic Equipment have started to venture into synthetic diamond field. Among them, Exin Diamond raised funds in 2016 to expand the scale of gem-grade decorative diamond products. In January 2017, it also signed a contract with European Research Institute for Monocrystalline Diamond to jointly construct a 300,000 sets/a gem-grade fancy blue diamond project.

The report is primarily concerned with the following:

- ◆ Market demand, import and export, price, competitive landscape, and development trends of monocrystalline synthetic diamond;
- ◆ Market development and trends of polycrystalline synthetic diamond, diamond micro-powder, and wire drawing die blanks;
- ◆ Market development of main synthetic diamond raw materials (including graphite, pyrophyllite, and metallic catalyst);
- ◆ Market development and trends of synthetic diamond sawblade, diamond grinding wheel, diamond cutter, diamond wire, and synthetic diamond;
- ◆ Operation and development strategy of 26 key global and Chinese synthetic diamond enterprises.

Output and YoY Growth of Synthetic Diamond in China, 2009-2020



Source: Global and China Synthetic Diamond Industry Report, 2016-2020 by ResearchInChina

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