

Global Polycrystalline Diamond Picks Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Polycrystalline Diamond Picks market size was valued at US\$ 144 million in 2025 and is forecast to a readjusted size of US\$ 196 million by 2032 with a CAGR of 4.6% during review period.

Polycrystalline diamond (PCD) cutting picks are hard-rock excavation tools that utilize a PCD composite insert as the cutting tip. They combine the extreme hardness and high wear resistance of diamond with the toughness of the substrate; compared to traditional cemented carbide picks, they typically offer a service life several times longer, significantly reducing replacement frequency and downtime, and substantially lowering construction costs in applications such as tunnel excavation and road milling.

Upstream components primarily include diamond micropowder, cemented carbide substrates, binders (such as cobalt or nickel), alloy steel bodies, brazing materials, wear-resistant hardfacing materials, and heat treatment auxiliaries. Notably, the diamond micropowder and cemented carbide substrate determine the wear resistance, impact resistance, and thermal stability of the PDC/PCD composite picks. Compared to standard cemented carbide picks, these products impose stricter requirements regarding composite insert quality, tip structural design, welding strength, and impact resistance matching.

In 2025, global sales volume for PCD cutting picks exceeded one million units, with an average market price of approximately \$105-\$145 per unit; major manufacturers in the industry achieved gross profit margins of roughly 32%-48%.

This report is a detailed and comprehensive analysis for global Polycrystalline Diamond

Picks market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Polycrystalline Diamond Picks market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Polycrystalline Diamond Picks market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Polycrystalline Diamond Picks market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Polycrystalline Diamond Picks market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Polycrystalline Diamond Picks

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Polycrystalline Diamond Picks market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Kennametal, SLB, BETEK, Haimingrun Superhard Materials, Guilin Star Diamond Superhard Material, Wuhan

Reetec Diamond, GuangKai Machinery Technology, Xi'an Jingwei Drilling Tools, Henan Huanghe Whirlwind, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Polycrystalline Diamond Picks market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Flat-Type Picks

Conical Picks

Market segment by End Equipment

Coal Shearer

Roadheader

Rotary Drilling Rig

Other

Market segment by Application

Coal Mining

Mining Operations

Tunneling

Road Milling

Other

Major players covered

Kennametal

SLB

BETEK

Haimingrun Superhard Materials

Guilin Star Diamond Superhard Material

Wuhan Reetec Diamond

GuangKai Machinery Technology

Xi'an Jingwei Drilling Tools

Henan Huanghe Whirlwind

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Polycrystalline Diamond Picks product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Polycrystalline Diamond Picks, with price, sales quantity, revenue, and global market share of Polycrystalline Diamond Picks from 2021 to 2026.

Chapter 3, the Polycrystalline Diamond Picks competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Polycrystalline Diamond Picks breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Polycrystalline Diamond Picks market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Polycrystalline Diamond Picks.

Chapter 14 and 15, to describe Polycrystalline Diamond Picks sales channel, distributors, customers, research findings and conclusion.

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