

Global Polycrystalline Diamond Picks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polycrystalline Diamond Picks market size is expected to reach \$ 196 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

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 studies the global Polycrystalline Diamond Picks production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polycrystalline Diamond Picks and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Polycrystalline Diamond Picks that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polycrystalline Diamond Picks total production and demand, 2021-2032, (K Units)

Global Polycrystalline Diamond Picks total production value, 2021-2032, (USD Million)

Global Polycrystalline Diamond Picks production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Polycrystalline Diamond Picks consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Polycrystalline Diamond Picks domestic production, consumption, key domestic manufacturers and share

Global Polycrystalline Diamond Picks production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Polycrystalline Diamond Picks production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Polycrystalline Diamond Picks production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Polycrystalline Diamond Picks market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Polycrystalline Diamond Picks market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Polycrystalline Diamond Picks Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polycrystalline Diamond Picks Market, Segmentation by Type:

Flat-Type Picks

Conical Picks

Global Polycrystalline Diamond Picks Market, Segmentation by End Equipment:

Coal Shearer

Roadheader

Rotary Drilling Rig

Other

Global Polycrystalline Diamond Picks Market, Segmentation by Application:

Coal Mining

Mining Operations

Tunneling

Road Milling

Other

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Polycrystalline Diamond Picks market?
2. What is the demand of the global Polycrystalline Diamond Picks market?
3. What is the year over year growth of the global Polycrystalline Diamond Picks market?
4. What is the production and production value of the global Polycrystalline Diamond Picks market?
5. Who are the key producers in the global Polycrystalline Diamond Picks market?
6. What are the growth factors driving the market demand?

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