

Global Polycrystalline Diamond Picks Market Growth 2026-2032

<https://marketpublishers.com/r/G1A6AD5856E3EN.html>

Date: July 2026

Pages: 100

Price: US\$ 3,660.00 (Single User License)

ID: G1A6AD5856E3EN

Abstracts

The global Polycrystalline Diamond Picks market size is predicted to grow from US\$ 137 million in 2025 to US\$ 190 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 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%.

United States market for Polycrystalline Diamond Picks is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Polycrystalline Diamond Picks is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Polycrystalline Diamond Picks is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Polycrystalline Diamond Picks players cover Kennametal, SLB, BETEK, Haimingrun Superhard Materials, Guilin Star Diamond Superhard Material, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the "Polycrystalline Diamond Picks Industry Forecast" looks at past sales and reviews total world Polycrystalline Diamond Picks sales in 2025, providing a comprehensive analysis by region and market sector of projected Polycrystalline Diamond Picks sales for 2026 through 2032. With Polycrystalline Diamond Picks sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Polycrystalline Diamond Picks industry.

This Insight Report provides a comprehensive analysis of the global Polycrystalline Diamond Picks landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Polycrystalline Diamond Picks portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Polycrystalline Diamond Picks market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Polycrystalline Diamond Picks and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Polycrystalline Diamond Picks.

This report presents a comprehensive overview, market shares, and growth opportunities of Polycrystalline Diamond Picks market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Flat-Type Picks

Conical Picks

Segmentation by End Equipment:

Coal Shearer

Roadheader

Rotary Drilling Rig

Other

Segmentation by Application:

Coal Mining

Mining Operations

Tunneling

Road Milling

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Polycrystalline Diamond Picks market?

What factors are driving Polycrystalline Diamond Picks market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Polycrystalline Diamond Picks market opportunities vary by end market size?

How does Polycrystalline Diamond Picks break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Polycrystalline Diamond Picks Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Polycrystalline Diamond Picks by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Polycrystalline Diamond Picks by Country/Region, 2021, 2025 & 2032

2.2 Polycrystalline Diamond Picks Segment by Type

- 2.2.1 Flat-Type Picks
- 2.2.2 Conical Picks
- 2.2.3 Polycrystalline Diamond Picks Sales by Type
 - 2.2.3.1 Global Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Polycrystalline Diamond Picks Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Polycrystalline Diamond Picks Sale Price by Type (2021-2026)

2.3 Polycrystalline Diamond Picks Segment by End Equipment

- 2.3.1 Coal Shearer
- 2.3.2 Roadheader
- 2.3.3 Rotary Drilling Rig
- 2.3.4 Other
- 2.3.5 Polycrystalline Diamond Picks Sales by End Equipment
 - 2.3.5.1 Global Polycrystalline Diamond Picks Sales Market Share by End Equipment (2021-2026)
 - 2.3.5.2 Global Polycrystalline Diamond Picks Revenue and Market Share by End

Equipment (2021-2026)

2.3.5.3 Global Polycrystalline Diamond Picks Sale Price by End Equipment (2021-2026)

2.4 Polycrystalline Diamond Picks Segment by Application

2.4.1 Coal Mining

2.4.2 Mining Operations

2.4.3 Tunneling

2.4.4 Road Milling

2.4.5 Other

2.4.6 Polycrystalline Diamond Picks Sales by Application

2.4.6.1 Global Polycrystalline Diamond Picks Sale Market Share by Application (2021-2026)

2.4.6.2 Global Polycrystalline Diamond Picks Revenue and Market Share by Application (2021-2026)

2.4.6.3 Global Polycrystalline Diamond Picks Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Polycrystalline Diamond Picks Breakdown Data by Company

3.1.1 Global Polycrystalline Diamond Picks Annual Sales by Company (2021-2026)

3.1.2 Global Polycrystalline Diamond Picks Sales Market Share by Company (2021-2026)

3.2 Global Polycrystalline Diamond Picks Annual Revenue by Company (2021-2026)

3.2.1 Global Polycrystalline Diamond Picks Revenue by Company (2021-2026)

3.2.2 Global Polycrystalline Diamond Picks Revenue Market Share by Company (2021-2026)

3.3 Global Polycrystalline Diamond Picks Sale Price by Company

3.4 Key Manufacturers Polycrystalline Diamond Picks Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Polycrystalline Diamond Picks Product Location Distribution

3.4.2 Players Polycrystalline Diamond Picks Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR POLYCRYSTALLINE DIAMOND PICKS BY GEOGRAPHIC REGION

4.1 World Historic Polycrystalline Diamond Picks Market Size by Geographic Region (2021-2026)

4.1.1 Global Polycrystalline Diamond Picks Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Polycrystalline Diamond Picks Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Polycrystalline Diamond Picks Market Size by Country/Region (2021-2026)

4.2.1 Global Polycrystalline Diamond Picks Annual Sales by Country/Region (2021-2026)

4.2.2 Global Polycrystalline Diamond Picks Annual Revenue by Country/Region (2021-2026)

4.3 Americas Polycrystalline Diamond Picks Sales Growth

4.4 APAC Polycrystalline Diamond Picks Sales Growth

4.5 Europe Polycrystalline Diamond Picks Sales Growth

4.6 Middle East & Africa Polycrystalline Diamond Picks Sales Growth

5 AMERICAS

5.1 Americas Polycrystalline Diamond Picks Sales by Country

5.1.1 Americas Polycrystalline Diamond Picks Sales by Country (2021-2026)

5.1.2 Americas Polycrystalline Diamond Picks Revenue by Country (2021-2026)

5.2 Americas Polycrystalline Diamond Picks Sales by Type (2021-2026)

5.3 Americas Polycrystalline Diamond Picks Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Polycrystalline Diamond Picks Sales by Region

6.1.1 APAC Polycrystalline Diamond Picks Sales by Region (2021-2026)

6.1.2 APAC Polycrystalline Diamond Picks Revenue by Region (2021-2026)

6.2 APAC Polycrystalline Diamond Picks Sales by Type (2021-2026)

6.3 APAC Polycrystalline Diamond Picks Sales by Application (2021-2026)

6.4 China

6.5 Japan

- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Polycrystalline Diamond Picks by Country
 - 7.1.1 Europe Polycrystalline Diamond Picks Sales by Country (2021-2026)
 - 7.1.2 Europe Polycrystalline Diamond Picks Revenue by Country (2021-2026)
- 7.2 Europe Polycrystalline Diamond Picks Sales by Type (2021-2026)
- 7.3 Europe Polycrystalline Diamond Picks Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Polycrystalline Diamond Picks by Country
 - 8.1.1 Middle East & Africa Polycrystalline Diamond Picks Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Polycrystalline Diamond Picks Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Polycrystalline Diamond Picks Sales by Type (2021-2026)
- 8.3 Middle East & Africa Polycrystalline Diamond Picks Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Polycrystalline Diamond Picks

10.3 Manufacturing Process Analysis of Polycrystalline Diamond Picks

10.4 Industry Chain Structure of Polycrystalline Diamond Picks

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Polycrystalline Diamond Picks Distributors

11.3 Polycrystalline Diamond Picks Customer

12 WORLD FORECAST REVIEW FOR POLYCRYSTALLINE DIAMOND PICKS BY GEOGRAPHIC REGION

12.1 Global Polycrystalline Diamond Picks Market Size Forecast by Region

12.1.1 Global Polycrystalline Diamond Picks Forecast by Region (2027-2032)

12.1.2 Global Polycrystalline Diamond Picks Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Polycrystalline Diamond Picks Forecast by Type (2027-2032)

12.7 Global Polycrystalline Diamond Picks Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Kennametal

13.1.1 Kennametal Company Information

13.1.2 Kennametal Polycrystalline Diamond Picks Product Portfolios and Specifications

13.1.3 Kennametal Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.1.4 Kennametal Main Business Overview
- 13.1.5 Kennametal Latest Developments
- 13.2 SLB
 - 13.2.1 SLB Company Information
 - 13.2.2 SLB Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.2.3 SLB Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 SLB Main Business Overview
 - 13.2.5 SLB Latest Developments
- 13.3 BETEK
 - 13.3.1 BETEK Company Information
 - 13.3.2 BETEK Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.3.3 BETEK Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 BETEK Main Business Overview
 - 13.3.5 BETEK Latest Developments
- 13.4 Haimingrun Superhard Materials
 - 13.4.1 Haimingrun Superhard Materials Company Information
 - 13.4.2 Haimingrun Superhard Materials Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.4.3 Haimingrun Superhard Materials Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Haimingrun Superhard Materials Main Business Overview
 - 13.4.5 Haimingrun Superhard Materials Latest Developments
- 13.5 Guilin Star Diamond Superhard Material
 - 13.5.1 Guilin Star Diamond Superhard Material Company Information
 - 13.5.2 Guilin Star Diamond Superhard Material Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.5.3 Guilin Star Diamond Superhard Material Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Guilin Star Diamond Superhard Material Main Business Overview
 - 13.5.5 Guilin Star Diamond Superhard Material Latest Developments
- 13.6 Wuhan Reetec Diamond
 - 13.6.1 Wuhan Reetec Diamond Company Information
 - 13.6.2 Wuhan Reetec Diamond Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.6.3 Wuhan Reetec Diamond Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Wuhan Reetec Diamond Main Business Overview

- 13.6.5 Wuhan Reetec Diamond Latest Developments
- 13.7 GuangKai Machinery Technology
 - 13.7.1 GuangKai Machinery Technology Company Information
 - 13.7.2 GuangKai Machinery Technology Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.7.3 GuangKai Machinery Technology Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 GuangKai Machinery Technology Main Business Overview
 - 13.7.5 GuangKai Machinery Technology Latest Developments
- 13.8 Xi'an Jingwei Drilling Tools
 - 13.8.1 Xi'an Jingwei Drilling Tools Company Information
 - 13.8.2 Xi'an Jingwei Drilling Tools Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.8.3 Xi'an Jingwei Drilling Tools Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Xi'an Jingwei Drilling Tools Main Business Overview
 - 13.8.5 Xi'an Jingwei Drilling Tools Latest Developments
- 13.9 Henan Huanghe Whirlwind
 - 13.9.1 Henan Huanghe Whirlwind Company Information
 - 13.9.2 Henan Huanghe Whirlwind Polycrystalline Diamond Picks Product Portfolios and Specifications
 - 13.9.3 Henan Huanghe Whirlwind Polycrystalline Diamond Picks Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Henan Huanghe Whirlwind Main Business Overview
 - 13.9.5 Henan Huanghe Whirlwind Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Polycrystalline Diamond Picks Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Polycrystalline Diamond Picks Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Flat-Type Picks

Table 4. Major Players of Conical Picks

Table 5. Global Polycrystalline Diamond Picks Sales by Type (2021-2026) & (K Units)

Table 6. Global Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)

Table 7. Global Polycrystalline Diamond Picks Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Polycrystalline Diamond Picks Revenue Market Share by Type (2021-2026)

Table 9. Global Polycrystalline Diamond Picks Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Coal Shearer

Table 11. Major Players of Roadheader

Table 12. Major Players of Rotary Drilling Rig

Table 13. Major Players of Other

Table 14. Global Polycrystalline Diamond Picks Sales by End Equipment (2021-2026) & (K Units)

Table 15. Global Polycrystalline Diamond Picks Sales Market Share by End Equipment (2021-2026)

Table 16. Global Polycrystalline Diamond Picks Revenue by End Equipment (2021-2026) & (\$ million)

Table 17. Global Polycrystalline Diamond Picks Revenue Market Share by End Equipment (2021-2026)

Table 18. Global Polycrystalline Diamond Picks Sale Price by End Equipment (2021-2026) & (US\$/Unit)

Table 19. Global Polycrystalline Diamond Picks Sale by Application (2021-2026) & (K Units)

Table 20. Global Polycrystalline Diamond Picks Sale Market Share by Application (2021-2026)

Table 21. Global Polycrystalline Diamond Picks Revenue by Application (2021-2026) & (\$ million)

Table 22. Global Polycrystalline Diamond Picks Revenue Market Share by Application (2021-2026)

Table 23. Global Polycrystalline Diamond Picks Sale Price by Application (2021-2026) & (US\$/Unit)

Table 24. Global Polycrystalline Diamond Picks Sales by Company (2021-2026) & (K Units)

Table 25. Global Polycrystalline Diamond Picks Sales Market Share by Company (2021-2026)

Table 26. Global Polycrystalline Diamond Picks Revenue by Company (2021-2026) & (\$ millions)

Table 27. Global Polycrystalline Diamond Picks Revenue Market Share by Company (2021-2026)

Table 28. Global Polycrystalline Diamond Picks Sale Price by Company (2021-2026) & (US\$/Unit)

Table 29. Key Manufacturers Polycrystalline Diamond Picks Producing Area Distribution and Sales Area

Table 30. Players Polycrystalline Diamond Picks Products Offered

Table 31. Polycrystalline Diamond Picks Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 32. New Products and Potential Entrants

Table 33. Market M&A Activity & Strategy

Table 34. Global Polycrystalline Diamond Picks Sales by Geographic Region (2021-2026) & (K Units)

Table 35. Global Polycrystalline Diamond Picks Sales Market Share Geographic Region (2021-2026)

Table 36. Global Polycrystalline Diamond Picks Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 37. Global Polycrystalline Diamond Picks Revenue Market Share by Geographic Region (2021-2026)

Table 38. Global Polycrystalline Diamond Picks Sales by Country/Region (2021-2026) & (K Units)

Table 39. Global Polycrystalline Diamond Picks Sales Market Share by Country/Region (2021-2026)

Table 40. Global Polycrystalline Diamond Picks Revenue by Country/Region (2021-2026) & (\$ millions)

Table 41. Global Polycrystalline Diamond Picks Revenue Market Share by Country/Region (2021-2026)

Table 42. Americas Polycrystalline Diamond Picks Sales by Country (2021-2026) & (K Units)

Table 43. Americas Polycrystalline Diamond Picks Sales Market Share by Country (2021-2026)

Table 44. Americas Polycrystalline Diamond Picks Revenue by Country (2021-2026) & (\$ millions)

Table 45. Americas Polycrystalline Diamond Picks Sales by Type (2021-2026) & (K Units)

Table 46. Americas Polycrystalline Diamond Picks Sales by Application (2021-2026) & (K Units)

Table 47. APAC Polycrystalline Diamond Picks Sales by Region (2021-2026) & (K Units)

Table 48. APAC Polycrystalline Diamond Picks Sales Market Share by Region (2021-2026)

Table 49. APAC Polycrystalline Diamond Picks Revenue by Region (2021-2026) & (\$ millions)

Table 50. APAC Polycrystalline Diamond Picks Sales by Type (2021-2026) & (K Units)

Table 51. APAC Polycrystalline Diamond Picks Sales by Application (2021-2026) & (K Units)

Table 52. Europe Polycrystalline Diamond Picks Sales by Country (2021-2026) & (K Units)

Table 53. Europe Polycrystalline Diamond Picks Revenue by Country (2021-2026) & (\$ millions)

Table 54. Europe Polycrystalline Diamond Picks Sales by Type (2021-2026) & (K Units)

Table 55. Europe Polycrystalline Diamond Picks Sales by Application (2021-2026) & (K Units)

Table 56. Middle East & Africa Polycrystalline Diamond Picks Sales by Country (2021-2026) & (K Units)

Table 57. Middle East & Africa Polycrystalline Diamond Picks Revenue Market Share by Country (2021-2026)

Table 58. Middle East & Africa Polycrystalline Diamond Picks Sales by Type (2021-2026) & (K Units)

Table 59. Middle East & Africa Polycrystalline Diamond Picks Sales by Application (2021-2026) & (K Units)

Table 60. Key Market Drivers & Growth Opportunities of Polycrystalline Diamond Picks

Table 61. Key Market Challenges & Risks of Polycrystalline Diamond Picks

Table 62. Key Industry Trends of Polycrystalline Diamond Picks

Table 63. Polycrystalline Diamond Picks Raw Material

Table 64. Key Suppliers of Raw Materials

Table 65. Polycrystalline Diamond Picks Distributors List

Table 66. Polycrystalline Diamond Picks Customer List

Table 67. Global Polycrystalline Diamond Picks Sales Forecast by Region (2027-2032) & (K Units)

Table 68. Global Polycrystalline Diamond Picks Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 69. Americas Polycrystalline Diamond Picks Sales Forecast by Country (2027-2032) & (K Units)

Table 70. Americas Polycrystalline Diamond Picks Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 71. APAC Polycrystalline Diamond Picks Sales Forecast by Region (2027-2032) & (K Units)

Table 72. APAC Polycrystalline Diamond Picks Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 73. Europe Polycrystalline Diamond Picks Sales Forecast by Country (2027-2032) & (K Units)

Table 74. Europe Polycrystalline Diamond Picks Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 75. Middle East & Africa Polycrystalline Diamond Picks Sales Forecast by Country (2027-2032) & (K Units)

Table 76. Middle East & Africa Polycrystalline Diamond Picks Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. Global Polycrystalline Diamond Picks Sales Forecast by Type (2027-2032) & (K Units)

Table 78. Global Polycrystalline Diamond Picks Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 79. Global Polycrystalline Diamond Picks Sales Forecast by Application (2027-2032) & (K Units)

Table 80. Global Polycrystalline Diamond Picks Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 81. Kennametal Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 82. Kennametal Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 83. Kennametal Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 84. Kennametal Main Business

Table 85. Kennametal Latest Developments

Table 86. SLB Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 87. SLB Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 88. SLB Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 89. SLB Main Business

Table 90. SLB Latest Developments

Table 91. BETEK Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 92. BETEK Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 93. BETEK Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. BETEK Main Business

Table 95. BETEK Latest Developments

Table 96. Haimingrun Superhard Materials Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 97. Haimingrun Superhard Materials Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 98. Haimingrun Superhard Materials Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. Haimingrun Superhard Materials Main Business

Table 100. Haimingrun Superhard Materials Latest Developments

Table 101. Guilin Star Diamond Superhard Material Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 102. Guilin Star Diamond Superhard Material Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 103. Guilin Star Diamond Superhard Material Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Guilin Star Diamond Superhard Material Main Business

Table 105. Guilin Star Diamond Superhard Material Latest Developments

Table 106. Wuhan Reetec Diamond Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 107. Wuhan Reetec Diamond Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 108. Wuhan Reetec Diamond Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. Wuhan Reetec Diamond Main Business

Table 110. Wuhan Reetec Diamond Latest Developments

Table 111. GuangKai Machinery Technology Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 112. GuangKai Machinery Technology Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 113. GuangKai Machinery Technology Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. GuangKai Machinery Technology Main Business

Table 115. GuangKai Machinery Technology Latest Developments

Table 116. Xi'an Jingwei Drilling Tools Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 117. Xi'an Jingwei Drilling Tools Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 118. Xi'an Jingwei Drilling Tools Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. Xi'an Jingwei Drilling Tools Main Business

Table 120. Xi'an Jingwei Drilling Tools Latest Developments

Table 121. Henan Huanghe Whirlwind Basic Information, Polycrystalline Diamond Picks Manufacturing Base, Sales Area and Its Competitors

Table 122. Henan Huanghe Whirlwind Polycrystalline Diamond Picks Product Portfolios and Specifications

Table 123. Henan Huanghe Whirlwind Polycrystalline Diamond Picks Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Henan Huanghe Whirlwind Main Business

Table 125. Henan Huanghe Whirlwind Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Polycrystalline Diamond Picks
- Figure 2. Polycrystalline Diamond Picks Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Polycrystalline Diamond Picks Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Polycrystalline Diamond Picks Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Polycrystalline Diamond Picks Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Polycrystalline Diamond Picks Sales Market Share by Country/Region (2025)
- Figure 10. Polycrystalline Diamond Picks Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Flat-Type Picks
- Figure 12. Product Picture of Conical Picks
- Figure 13. Global Polycrystalline Diamond Picks Sales Market Share by Type in 2026
- Figure 14. Global Polycrystalline Diamond Picks Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Coal Shearer
- Figure 16. Product Picture of Roadheader
- Figure 17. Product Picture of Rotary Drilling Rig
- Figure 18. Product Picture of Other
- Figure 19. Global Polycrystalline Diamond Picks Sales Market Share by End Equipment in 2026
- Figure 20. Global Polycrystalline Diamond Picks Revenue Market Share by End Equipment (2021-2026)
- Figure 21. Polycrystalline Diamond Picks Consumed in Coal Mining
- Figure 22. Global Polycrystalline Diamond Picks Market: Coal Mining (2021-2026) & (K Units)
- Figure 23. Polycrystalline Diamond Picks Consumed in Mining Operations
- Figure 24. Global Polycrystalline Diamond Picks Market: Mining Operations (2021-2026) & (K Units)
- Figure 25. Polycrystalline Diamond Picks Consumed in Tunneling
- Figure 26. Global Polycrystalline Diamond Picks Market: Tunneling (2021-2026) & (K Units)

- Figure 27. Polycrystalline Diamond Picks Consumed in Road Milling
- Figure 28. Global Polycrystalline Diamond Picks Market: Road Milling (2021-2026) & (K Units)
- Figure 29. Polycrystalline Diamond Picks Consumed in Other
- Figure 30. Global Polycrystalline Diamond Picks Market: Other (2021-2026) & (K Units)
- Figure 31. Global Polycrystalline Diamond Picks Sale Market Share by Application (2025)
- Figure 32. Global Polycrystalline Diamond Picks Revenue Market Share by Application in 2025
- Figure 33. Polycrystalline Diamond Picks Sales by Company in 2025 (K Units)
- Figure 34. Global Polycrystalline Diamond Picks Sales Market Share by Company in 2025
- Figure 35. Polycrystalline Diamond Picks Revenue by Company in 2025 (\$ millions)
- Figure 36. Global Polycrystalline Diamond Picks Revenue Market Share by Company in 2025
- Figure 37. Global Polycrystalline Diamond Picks Sales Market Share by Geographic Region (2021-2026)
- Figure 38. Global Polycrystalline Diamond Picks Revenue Market Share by Geographic Region in 2025
- Figure 39. Americas Polycrystalline Diamond Picks Sales 2021-2026 (K Units)
- Figure 40. Americas Polycrystalline Diamond Picks Revenue 2021-2026 (\$ millions)
- Figure 41. APAC Polycrystalline Diamond Picks Sales 2021-2026 (K Units)
- Figure 42. APAC Polycrystalline Diamond Picks Revenue 2021-2026 (\$ millions)
- Figure 43. Europe Polycrystalline Diamond Picks Sales 2021-2026 (K Units)
- Figure 44. Europe Polycrystalline Diamond Picks Revenue 2021-2026 (\$ millions)
- Figure 45. Middle East & Africa Polycrystalline Diamond Picks Sales 2021-2026 (K Units)
- Figure 46. Middle East & Africa Polycrystalline Diamond Picks Revenue 2021-2026 (\$ millions)
- Figure 47. Americas Polycrystalline Diamond Picks Sales Market Share by Country in 2025
- Figure 48. Americas Polycrystalline Diamond Picks Revenue Market Share by Country (2021-2026)
- Figure 49. Americas Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)
- Figure 50. Americas Polycrystalline Diamond Picks Sales Market Share by Application (2021-2026)
- Figure 51. United States Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Polycrystalline Diamond Picks Sales Market Share by Region in 2025

Figure 56. APAC Polycrystalline Diamond Picks Revenue Market Share by Region (2021-2026)

Figure 57. APAC Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)

Figure 58. APAC Polycrystalline Diamond Picks Sales Market Share by Application (2021-2026)

Figure 59. China Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Polycrystalline Diamond Picks Sales Market Share by Country in 2025

Figure 67. Europe Polycrystalline Diamond Picks Revenue Market Share by Country (2021-2026)

Figure 68. Europe Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)

Figure 69. Europe Polycrystalline Diamond Picks Sales Market Share by Application (2021-2026)

Figure 70. Germany Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$

millions)

Figure 75. Middle East & Africa Polycrystalline Diamond Picks Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Polycrystalline Diamond Picks Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Polycrystalline Diamond Picks Sales Market Share by Application (2021-2026)

Figure 78. Egypt Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Polycrystalline Diamond Picks Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Polycrystalline Diamond Picks in 2026

Figure 84. Manufacturing Process Analysis of Polycrystalline Diamond Picks

Figure 85. Industry Chain Structure of Polycrystalline Diamond Picks

Figure 86. Channels of Distribution

Figure 87. Global Polycrystalline Diamond Picks Sales Market Forecast by Region (2027-2032)

Figure 88. Global Polycrystalline Diamond Picks Revenue Market Share Forecast by Region (2027-2032)

Figure 89. Global Polycrystalline Diamond Picks Sales Market Share Forecast by Type (2027-2032)

Figure 90. Global Polycrystalline Diamond Picks Revenue Market Share Forecast by Type (2027-2032)

Figure 91. Global Polycrystalline Diamond Picks Sales Market Share Forecast by Application (2027-2032)

Figure 92. Global Polycrystalline Diamond Picks Revenue Market Share Forecast by Application (2027-2032)

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