

Global Sapphire Rough Market Growth 2026-2032

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Abstracts

The global Sapphire Rough market size is predicted to grow from US\$ 303 million in 2025 to US\$ 233 million in 2032; it is expected to grow at a CAGR of -3.2% from 2026 to 2032.

Sapphire rough refers to gem-quality corundum crystals (Al_2O_3) in all colors other than red (ruby), with a Mohs hardness of 9, widely used in high-end jewelry, investment collecting, and industrial applications such as watch crystals. Major global sources include Madagascar, Sri Lanka, Myanmar, Australia, Thailand, Tanzania, and the U.S. (Montana), with Madagascar now the largest supplier, while traditional deposits in Kashmir and Myanmar are increasingly depleted. In recent years, lab-grown sapphire technology has matured, producing material with identical physical and chemical properties at far lower production costs than mining, rapidly eroding the market for natural sapphire in the mid-to-low tier. Nevertheless, high-quality unheated sapphires retain irreplaceable value due to their rarity and collectability. The stable supply and pricing of this category exert a fundamental influence on the global colored gemstone industry, and its market trend serves as a key indicator of the competition between natural and lab-grown gems.

The per-carat price of sapphire rough is extremely polarized. Top-grade unheated cornflower or royal blue large crystals command persistently high prices with occasional sharp increases, driven by depleting traditional deposits and firm collector demand. In contrast, commercial-grade blue and fancy sapphire rough face direct competition from lab-grown alternatives, leading to a long-term softening of actual transaction prices for most low-to-mid tier material. Gross margins likewise diverge: miners with access to premium unheated rough enjoy strong profitability, but such material accounts for a tiny fraction of total output; those relying on commercial-grade material see their margins steadily compressed by synthetic sapphire pricing.

Downstream consumption is dominated by jewelry, with engagement rings and high-end custom pieces absorbing the finest rough, while mass-produced fashion accessories and silver jewelry consume large volumes of lower-grade material. Younger consumers have shown a growing preference for colored gemstones, yet synthetic sapphire, with its perfect clarity, customizable colors and low cost, is rapidly replacing natural products in the mid-to-low market. Incremental demand comes mainly from bridal jewelry consumption in emerging Asian economies and sustained collector interest in unheated fine sapphires, but these segments are too small to offset the erosion of the mass market by lab-grown stones.

The upstream competitive landscape is highly fragmented. A handful of scaled operators in Australia, Madagascar and Sri Lanka control a portion of commercial mining, but much of the sector remains dominated by artisanal and small-scale miners. Resource depletion in traditional districts such as Myanmar and Tanzania has intensified scarcity of high-quality rough. Bangkok and Jaipur, as global cutting and trading hubs for colored stones, wield significant influence in the distribution chain. Synthetic sapphire production has become highly industrialized, and its cost advantage and technical maturity place persistent downward pressure on the natural rough market.

Key uncertainties include further technological advances in lab-grown gemstones, rising consumer attention to traceability and sustainable mining, and the impact of political and economic conditions in major producing regions on rough supply. In summary, the sapphire rough market will continue its structural bifurcation: rare, unheated large stones with exceptional color and clarity will hold or increase in value, while the vast majority of mid-to-low grade natural rough will face ongoing price depression and demand contraction. Industry profitability will concentrate among those controlling premium mining sources and owning retail brands, while pure intermediate trading will see its space steadily shrink.

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

This Insight Report provides a comprehensive analysis of the global Sapphire Rough 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 Sapphire Rough portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Sapphire Rough market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sapphire Rough 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 Sapphire Rough.

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

Segmentation by Type:

Blue Sapphire

Padparadscha

Fancy Sapphire

Star Sapphire

Segmentation by Weight:

Small (10 ct)

Segmentation by Application:

High-End Jewelry

Commercial Jewelry

Industrial Use

Carvings & Art Objects

Collectors & Specimen

Others

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.

FURA Gems

Capricorn Sapphire

Great Northern Mining

Australian Sapphire Corporation

Gemfields

Myanmar Gems Enterprise

SANT Enterprises

MineCore International

Wennick-Lefèvre

TUMICO

Baw Mar

Montana Gems of Philipsburg

Gem Mines of America

Superior Mining

Zahana Madagascar Mine

AG Mining

J. Stern Sass

United Sapres

Gem Lanka International

Regal Gems

Punsiri Gems

Nash Universal Ventures

Thai Lanka Trading

UD.R. Ceylon

Master Cut Gems

Top Gem Gems

Ceylon Industries

Sri Gems

Key Questions Addressed in this Report

What is the 10-year outlook for the global Sapphire Rough market?

What factors are driving Sapphire Rough market growth, globally and by region?

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

How do Sapphire Rough market opportunities vary by end market size?

How does Sapphire Rough 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 Sapphire Rough Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Sapphire Rough by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Sapphire Rough by Country/Region, 2021, 2025 & 2032
- 2.2 Sapphire Rough Segment by Type
 - 2.2.1 Blue Sapphire
 - 2.2.2 Padparadscha
 - 2.2.3 Fancy Sapphire
 - 2.2.4 Star Sapphire
 - 2.2.5 Sapphire Rough Sales by Type
 - 2.2.5.1 Global Sapphire Rough Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Sapphire Rough Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Sapphire Rough Sale Price by Type (2021-2026)
- 2.3 Sapphire Rough Segment by Weight
 - 2.3.1 Small (10 ct)
 - 2.3.5 Sapphire Rough Sales by Weight
 - 2.3.5.1 Global Sapphire Rough Sales Market Share by Weight (2021-2026)
 - 2.3.5.2 Global Sapphire Rough Revenue and Market Share by Weight (2021-2026)
 - 2.3.5.3 Global Sapphire Rough Sale Price by Weight (2021-2026)
- 2.4 Sapphire Rough Segment by Application
 - 2.4.1 High-End Jewelry
 - 2.4.2 Commercial Jewelry

- 2.4.3 Industrial Use
- 2.4.4 Carvings & Art Objects
- 2.4.5 Collectors & Specimen
- 2.4.6 Others
- 2.4.7 Sapphire Rough Sales by Application
 - 2.4.7.1 Global Sapphire Rough Sale Market Share by Application (2021-2026)
 - 2.4.7.2 Global Sapphire Rough Revenue and Market Share by Application (2021-2026)
 - 2.4.7.3 Global Sapphire Rough Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Sapphire Rough Breakdown Data by Company
 - 3.1.1 Global Sapphire Rough Annual Sales by Company (2021-2026)
 - 3.1.2 Global Sapphire Rough Sales Market Share by Company (2021-2026)
- 3.2 Global Sapphire Rough Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Sapphire Rough Revenue by Company (2021-2026)
 - 3.2.2 Global Sapphire Rough Revenue Market Share by Company (2021-2026)
- 3.3 Global Sapphire Rough Sale Price by Company
- 3.4 Key Manufacturers Sapphire Rough Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Sapphire Rough Product Location Distribution
 - 3.4.2 Players Sapphire Rough 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 SAPPHIRE ROUGH BY GEOGRAPHIC REGION

- 4.1 World Historic Sapphire Rough Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Sapphire Rough Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Sapphire Rough Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Sapphire Rough Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Sapphire Rough Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Sapphire Rough Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Sapphire Rough Sales Growth
- 4.4 APAC Sapphire Rough Sales Growth

4.5 Europe Sapphire Rough Sales Growth

4.6 Middle East & Africa Sapphire Rough Sales Growth

5 AMERICAS

5.1 Americas Sapphire Rough Sales by Country

5.1.1 Americas Sapphire Rough Sales by Country (2021-2026)

5.1.2 Americas Sapphire Rough Revenue by Country (2021-2026)

5.2 Americas Sapphire Rough Sales by Type (2021-2026)

5.3 Americas Sapphire Rough Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Sapphire Rough Sales by Region

6.1.1 APAC Sapphire Rough Sales by Region (2021-2026)

6.1.2 APAC Sapphire Rough Revenue by Region (2021-2026)

6.2 APAC Sapphire Rough Sales by Type (2021-2026)

6.3 APAC Sapphire Rough 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 Sapphire Rough by Country

7.1.1 Europe Sapphire Rough Sales by Country (2021-2026)

7.1.2 Europe Sapphire Rough Revenue by Country (2021-2026)

7.2 Europe Sapphire Rough Sales by Type (2021-2026)

7.3 Europe Sapphire Rough 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 Sapphire Rough by Country

8.1.1 Middle East & Africa Sapphire Rough Sales by Country (2021-2026)

8.1.2 Middle East & Africa Sapphire Rough Revenue by Country (2021-2026)

8.2 Middle East & Africa Sapphire Rough Sales by Type (2021-2026)

8.3 Middle East & Africa Sapphire Rough 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 Sapphire Rough

10.3 Manufacturing Process Analysis of Sapphire Rough

10.4 Industry Chain Structure of Sapphire Rough

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Sapphire Rough Distributors

11.3 Sapphire Rough Customer

12 WORLD FORECAST REVIEW FOR SAPPHIRE ROUGH BY GEOGRAPHIC

REGION

12.1 Global Sapphire Rough Market Size Forecast by Region

12.1.1 Global Sapphire Rough Forecast by Region (2027-2032)

12.1.2 Global Sapphire Rough 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 Sapphire Rough Forecast by Type (2027-2032)

12.7 Global Sapphire Rough Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 FURA Gems

13.1.1 FURA Gems Company Information

13.1.2 FURA Gems Sapphire Rough Product Portfolios and Specifications

13.1.3 FURA Gems Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 FURA Gems Main Business Overview

13.1.5 FURA Gems Latest Developments

13.2 Capricorn Sapphire

13.2.1 Capricorn Sapphire Company Information

13.2.2 Capricorn Sapphire Sapphire Rough Product Portfolios and Specifications

13.2.3 Capricorn Sapphire Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Capricorn Sapphire Main Business Overview

13.2.5 Capricorn Sapphire Latest Developments

13.3 Great Northern Mining

13.3.1 Great Northern Mining Company Information

13.3.2 Great Northern Mining Sapphire Rough Product Portfolios and Specifications

13.3.3 Great Northern Mining Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Great Northern Mining Main Business Overview

13.3.5 Great Northern Mining Latest Developments

13.4 Australian Sapphire Corporation

13.4.1 Australian Sapphire Corporation Company Information

13.4.2 Australian Sapphire Corporation Sapphire Rough Product Portfolios and Specifications

13.4.3 Australian Sapphire Corporation Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Australian Sapphire Corporation Main Business Overview

13.4.5 Australian Sapphire Corporation Latest Developments

13.5 Gemfields

13.5.1 Gemfields Company Information

13.5.2 Gemfields Sapphire Rough Product Portfolios and Specifications

13.5.3 Gemfields Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Gemfields Main Business Overview

13.5.5 Gemfields Latest Developments

13.6 Myanmar Gems Enterprise

13.6.1 Myanmar Gems Enterprise Company Information

13.6.2 Myanmar Gems Enterprise Sapphire Rough Product Portfolios and Specifications

13.6.3 Myanmar Gems Enterprise Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Myanmar Gems Enterprise Main Business Overview

13.6.5 Myanmar Gems Enterprise Latest Developments

13.7 SANT Enterprises

13.7.1 SANT Enterprises Company Information

13.7.2 SANT Enterprises Sapphire Rough Product Portfolios and Specifications

13.7.3 SANT Enterprises Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 SANT Enterprises Main Business Overview

13.7.5 SANT Enterprises Latest Developments

13.8 MineCore International

13.8.1 MineCore International Company Information

13.8.2 MineCore International Sapphire Rough Product Portfolios and Specifications

13.8.3 MineCore International Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 MineCore International Main Business Overview

13.8.5 MineCore International Latest Developments

13.9 Wennick-Lefèvre

13.9.1 Wennick-Lefèvre Company Information

13.9.2 Wennick-Lefèvre Sapphire Rough Product Portfolios and Specifications

13.9.3 Wennick-Lefèvre Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Wennick-Lefèvre Main Business Overview

- 13.9.5 Wennick-Lefèvre Latest Developments
- 13.10 TUMICO
 - 13.10.1 TUMICO Company Information
 - 13.10.2 TUMICO Sapphire Rough Product Portfolios and Specifications
 - 13.10.3 TUMICO Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 TUMICO Main Business Overview
 - 13.10.5 TUMICO Latest Developments
- 13.11 Baw Mar
 - 13.11.1 Baw Mar Company Information
 - 13.11.2 Baw Mar Sapphire Rough Product Portfolios and Specifications
 - 13.11.3 Baw Mar Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Baw Mar Main Business Overview
 - 13.11.5 Baw Mar Latest Developments
- 13.12 Montana Gems of Philipsburg
 - 13.12.1 Montana Gems of Philipsburg Company Information
 - 13.12.2 Montana Gems of Philipsburg Sapphire Rough Product Portfolios and Specifications
 - 13.12.3 Montana Gems of Philipsburg Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Montana Gems of Philipsburg Main Business Overview
 - 13.12.5 Montana Gems of Philipsburg Latest Developments
- 13.13 Gem Mines of America
 - 13.13.1 Gem Mines of America Company Information
 - 13.13.2 Gem Mines of America Sapphire Rough Product Portfolios and Specifications
 - 13.13.3 Gem Mines of America Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Gem Mines of America Main Business Overview
 - 13.13.5 Gem Mines of America Latest Developments
- 13.14 Superior Mining
 - 13.14.1 Superior Mining Company Information
 - 13.14.2 Superior Mining Sapphire Rough Product Portfolios and Specifications
 - 13.14.3 Superior Mining Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Superior Mining Main Business Overview
 - 13.14.5 Superior Mining Latest Developments
- 13.15 Zahana Madagascar Mine
 - 13.15.1 Zahana Madagascar Mine Company Information

13.15.2 Zahana Madagascar Mine Sapphire Rough Product Portfolios and Specifications

13.15.3 Zahana Madagascar Mine Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Zahana Madagascar Mine Main Business Overview

13.15.5 Zahana Madagascar Mine Latest Developments

13.16 AG Mining

13.16.1 AG Mining Company Information

13.16.2 AG Mining Sapphire Rough Product Portfolios and Specifications

13.16.3 AG Mining Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 AG Mining Main Business Overview

13.16.5 AG Mining Latest Developments

13.17 J. Stern Sass

13.17.1 J. Stern Sass Company Information

13.17.2 J. Stern Sass Sapphire Rough Product Portfolios and Specifications

13.17.3 J. Stern Sass Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 J. Stern Sass Main Business Overview

13.17.5 J. Stern Sass Latest Developments

13.18 United Sapres

13.18.1 United Sapres Company Information

13.18.2 United Sapres Sapphire Rough Product Portfolios and Specifications

13.18.3 United Sapres Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 United Sapres Main Business Overview

13.18.5 United Sapres Latest Developments

13.19 Gem Lanka International

13.19.1 Gem Lanka International Company Information

13.19.2 Gem Lanka International Sapphire Rough Product Portfolios and Specifications

13.19.3 Gem Lanka International Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Gem Lanka International Main Business Overview

13.19.5 Gem Lanka International Latest Developments

13.20 Regal Gems

13.20.1 Regal Gems Company Information

13.20.2 Regal Gems Sapphire Rough Product Portfolios and Specifications

13.20.3 Regal Gems Sapphire Rough Sales, Revenue, Price and Gross Margin

(2021-2026)

13.20.4 Regal Gems Main Business Overview

13.20.5 Regal Gems Latest Developments

13.21 Punsiri Gems

13.21.1 Punsiri Gems Company Information

13.21.2 Punsiri Gems Sapphire Rough Product Portfolios and Specifications

13.21.3 Punsiri Gems Sapphire Rough Sales, Revenue, Price and Gross Margin

(2021-2026)

13.21.4 Punsiri Gems Main Business Overview

13.21.5 Punsiri Gems Latest Developments

13.22 Nash Universal Ventures

13.22.1 Nash Universal Ventures Company Information

13.22.2 Nash Universal Ventures Sapphire Rough Product Portfolios and Specifications

13.22.3 Nash Universal Ventures Sapphire Rough Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Nash Universal Ventures Main Business Overview

13.22.5 Nash Universal Ventures Latest Developments

13.23 Thai Lanka Trading

13.23.1 Thai Lanka Trading Company Information

13.23.2 Thai Lanka Trading Sapphire Rough Product Portfolios and Specifications

13.23.3 Thai Lanka Trading Sapphire Rough Sales, Revenue, Price and Gross Margin

(2021-2026)

13.23.4 Thai Lanka Trading Main Business Overview

13.23.5 Thai Lanka Trading Latest Developments

13.24 UD.R. Ceylon

13.24.1 UD.R. Ceylon Company Information

13.24.2 UD.R. Ceylon Sapphire Rough Product Portfolios and Specifications

13.24.3 UD.R. Ceylon Sapphire Rough Sales, Revenue, Price and Gross Margin

(2021-2026)

13.24.4 UD.R. Ceylon Main Business Overview

13.24.5 UD.R. Ceylon Latest Developments

13.25 Master Cut Gems

13.25.1 Master Cut Gems Company Information

13.25.2 Master Cut Gems Sapphire Rough Product Portfolios and Specifications

13.25.3 Master Cut Gems Sapphire Rough Sales, Revenue, Price and Gross Margin

(2021-2026)

13.25.4 Master Cut Gems Main Business Overview

13.25.5 Master Cut Gems Latest Developments

13.26 Top Gem Gems

13.26.1 Top Gem Gems Company Information

13.26.2 Top Gem Gems Sapphire Rough Product Portfolios and Specifications

13.26.3 Top Gem Gems Sapphire Rough Sales, Revenue, Price and Gross Margin
(2021-2026)

13.26.4 Top Gem Gems Main Business Overview

13.26.5 Top Gem Gems Latest Developments

13.27 Ceylon Industries

13.27.1 Ceylon Industries Company Information

13.27.2 Ceylon Industries Sapphire Rough Product Portfolios and Specifications

13.27.3 Ceylon Industries Sapphire Rough Sales, Revenue, Price and Gross Margin
(2021-2026)

13.27.4 Ceylon Industries Main Business Overview

13.27.5 Ceylon Industries Latest Developments

13.28 Sri Gems

13.28.1 Sri Gems Company Information

13.28.2 Sri Gems Sapphire Rough Product Portfolios and Specifications

13.28.3 Sri Gems Sapphire Rough Sales, Revenue, Price and Gross Margin
(2021-2026)

13.28.4 Sri Gems Main Business Overview

13.28.5 Sri Gems Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Sapphire Rough Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Sapphire Rough Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Blue Sapphire
- Table 4. Major Players of Padparadscha
- Table 5. Major Players of Fancy Sapphire
- Table 6. Major Players of Star Sapphire
- Table 7. Global Sapphire Rough Sales by Type (2021-2026) & (g)
- Table 8. Global Sapphire Rough Sales Market Share by Type (2021-2026)
- Table 9. Global Sapphire Rough Revenue by Type (2021-2026) & (\$ million)
- Table 10. Global Sapphire Rough Revenue Market Share by Type (2021-2026)
- Table 11. Global Sapphire Rough Sale Price by Type (2021-2026) & (US\$/g)
- Table 12. Major Players of Small (10 ct)
- Table 16. Global Sapphire Rough Sales by Weight (2021-2026) & (g)
- Table 17. Global Sapphire Rough Sales Market Share by Weight (2021-2026)
- Table 18. Global Sapphire Rough Revenue by Weight (2021-2026) & (\$ million)
- Table 19. Global Sapphire Rough Revenue Market Share by Weight (2021-2026)
- Table 20. Global Sapphire Rough Sale Price by Weight (2021-2026) & (US\$/g)
- Table 21. Global Sapphire Rough Sale by Application (2021-2026) & (g)
- Table 22. Global Sapphire Rough Sale Market Share by Application (2021-2026)
- Table 23. Global Sapphire Rough Revenue by Application (2021-2026) & (\$ million)
- Table 24. Global Sapphire Rough Revenue Market Share by Application (2021-2026)
- Table 25. Global Sapphire Rough Sale Price by Application (2021-2026) & (US\$/g)
- Table 26. Global Sapphire Rough Sales by Company (2021-2026) & (g)
- Table 27. Global Sapphire Rough Sales Market Share by Company (2021-2026)
- Table 28. Global Sapphire Rough Revenue by Company (2021-2026) & (\$ millions)
- Table 29. Global Sapphire Rough Revenue Market Share by Company (2021-2026)
- Table 30. Global Sapphire Rough Sale Price by Company (2021-2026) & (US\$/g)
- Table 31. Key Manufacturers Sapphire Rough Producing Area Distribution and Sales Area
- Table 32. Players Sapphire Rough Products Offered
- Table 33. Sapphire Rough Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- Table 34. New Products and Potential Entrants
- Table 35. Market M&A Activity & Strategy

Table 36. Global Sapphire Rough Sales by Geographic Region (2021-2026) & (g)
Table 37. Global Sapphire Rough Sales Market Share Geographic Region (2021-2026)
Table 38. Global Sapphire Rough Revenue by Geographic Region (2021-2026) & (\$ millions)
Table 39. Global Sapphire Rough Revenue Market Share by Geographic Region (2021-2026)
Table 40. Global Sapphire Rough Sales by Country/Region (2021-2026) & (g)
Table 41. Global Sapphire Rough Sales Market Share by Country/Region (2021-2026)
Table 42. Global Sapphire Rough Revenue by Country/Region (2021-2026) & (\$ millions)
Table 43. Global Sapphire Rough Revenue Market Share by Country/Region (2021-2026)
Table 44. Americas Sapphire Rough Sales by Country (2021-2026) & (g)
Table 45. Americas Sapphire Rough Sales Market Share by Country (2021-2026)
Table 46. Americas Sapphire Rough Revenue by Country (2021-2026) & (\$ millions)
Table 47. Americas Sapphire Rough Sales by Type (2021-2026) & (g)
Table 48. Americas Sapphire Rough Sales by Application (2021-2026) & (g)
Table 49. APAC Sapphire Rough Sales by Region (2021-2026) & (g)
Table 50. APAC Sapphire Rough Sales Market Share by Region (2021-2026)
Table 51. APAC Sapphire Rough Revenue by Region (2021-2026) & (\$ millions)
Table 52. APAC Sapphire Rough Sales by Type (2021-2026) & (g)
Table 53. APAC Sapphire Rough Sales by Application (2021-2026) & (g)
Table 54. Europe Sapphire Rough Sales by Country (2021-2026) & (g)
Table 55. Europe Sapphire Rough Revenue by Country (2021-2026) & (\$ millions)
Table 56. Europe Sapphire Rough Sales by Type (2021-2026) & (g)
Table 57. Europe Sapphire Rough Sales by Application (2021-2026) & (g)
Table 58. Middle East & Africa Sapphire Rough Sales by Country (2021-2026) & (g)
Table 59. Middle East & Africa Sapphire Rough Revenue Market Share by Country (2021-2026)
Table 60. Middle East & Africa Sapphire Rough Sales by Type (2021-2026) & (g)
Table 61. Middle East & Africa Sapphire Rough Sales by Application (2021-2026) & (g)
Table 62. Key Market Drivers & Growth Opportunities of Sapphire Rough
Table 63. Key Market Challenges & Risks of Sapphire Rough
Table 64. Key Industry Trends of Sapphire Rough
Table 65. Sapphire Rough Raw Material
Table 66. Key Suppliers of Raw Materials
Table 67. Sapphire Rough Distributors List
Table 68. Sapphire Rough Customer List
Table 69. Global Sapphire Rough Sales Forecast by Region (2027-2032) & (g)

Table 70. Global Sapphire Rough Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 71. Americas Sapphire Rough Sales Forecast by Country (2027-2032) & (g)

Table 72. Americas Sapphire Rough Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 73. APAC Sapphire Rough Sales Forecast by Region (2027-2032) & (g)

Table 74. APAC Sapphire Rough Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Europe Sapphire Rough Sales Forecast by Country (2027-2032) & (g)

Table 76. Europe Sapphire Rough Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. Middle East & Africa Sapphire Rough Sales Forecast by Country (2027-2032) & (g)

Table 78. Middle East & Africa Sapphire Rough Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. Global Sapphire Rough Sales Forecast by Type (2027-2032) & (g)

Table 80. Global Sapphire Rough Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 81. Global Sapphire Rough Sales Forecast by Application (2027-2032) & (g)

Table 82. Global Sapphire Rough Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 83. FURA Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 84. FURA Gems Sapphire Rough Product Portfolios and Specifications

Table 85. FURA Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 86. FURA Gems Main Business

Table 87. FURA Gems Latest Developments

Table 88. Capricorn Sapphire Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 89. Capricorn Sapphire Sapphire Rough Product Portfolios and Specifications

Table 90. Capricorn Sapphire Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 91. Capricorn Sapphire Main Business

Table 92. Capricorn Sapphire Latest Developments

Table 93. Great Northern Mining Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 94. Great Northern Mining Sapphire Rough Product Portfolios and Specifications

Table 95. Great Northern Mining Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 96. Great Northern Mining Main Business

Table 97. Great Northern Mining Latest Developments

Table 98. Australian Sapphire Corporation Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 99. Australian Sapphire Corporation Sapphire Rough Product Portfolios and Specifications

Table 100. Australian Sapphire Corporation Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 101. Australian Sapphire Corporation Main Business

Table 102. Australian Sapphire Corporation Latest Developments

Table 103. Gemfields Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 104. Gemfields Sapphire Rough Product Portfolios and Specifications

Table 105. Gemfields Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 106. Gemfields Main Business

Table 107. Gemfields Latest Developments

Table 108. Myanmar Gems Enterprise Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 109. Myanmar Gems Enterprise Sapphire Rough Product Portfolios and Specifications

Table 110. Myanmar Gems Enterprise Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 111. Myanmar Gems Enterprise Main Business

Table 112. Myanmar Gems Enterprise Latest Developments

Table 113. SANT Enterprises Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 114. SANT Enterprises Sapphire Rough Product Portfolios and Specifications

Table 115. SANT Enterprises Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 116. SANT Enterprises Main Business

Table 117. SANT Enterprises Latest Developments

Table 118. MineCore International Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 119. MineCore International Sapphire Rough Product Portfolios and Specifications

Table 120. MineCore International Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 121. MineCore International Main Business

Table 122. MineCore International Latest Developments

Table 123. Wennick-Lefvre Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 124. Wennick-Lefvre Sapphire Rough Product Portfolios and Specifications

Table 125. Wennick-Lefvre Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 126. Wennick-Lefvre Main Business

Table 127. Wennick-Lefvre Latest Developments

Table 128. TUMICO Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 129. TUMICO Sapphire Rough Product Portfolios and Specifications

Table 130. TUMICO Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 131. TUMICO Main Business

Table 132. TUMICO Latest Developments

Table 133. Baw Mar Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 134. Baw Mar Sapphire Rough Product Portfolios and Specifications

Table 135. Baw Mar Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 136. Baw Mar Main Business

Table 137. Baw Mar Latest Developments

Table 138. Montana Gems of Philipsburg Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 139. Montana Gems of Philipsburg Sapphire Rough Product Portfolios and Specifications

Table 140. Montana Gems of Philipsburg Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 141. Montana Gems of Philipsburg Main Business

Table 142. Montana Gems of Philipsburg Latest Developments

Table 143. Gem Mines of America Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 144. Gem Mines of America Sapphire Rough Product Portfolios and Specifications

Table 145. Gem Mines of America Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 146. Gem Mines of America Main Business

Table 147. Gem Mines of America Latest Developments

Table 148. Superior Mining Basic Information, Sapphire Rough Manufacturing Base,

Sales Area and Its Competitors

Table 149. Superior Mining Sapphire Rough Product Portfolios and Specifications

Table 150. Superior Mining Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 151. Superior Mining Main Business

Table 152. Superior Mining Latest Developments

Table 153. Zahana Madagascar Mine Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 154. Zahana Madagascar Mine Sapphire Rough Product Portfolios and Specifications

Table 155. Zahana Madagascar Mine Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 156. Zahana Madagascar Mine Main Business

Table 157. Zahana Madagascar Mine Latest Developments

Table 158. AG Mining Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 159. AG Mining Sapphire Rough Product Portfolios and Specifications

Table 160. AG Mining Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 161. AG Mining Main Business

Table 162. AG Mining Latest Developments

Table 163. J. Stern Sass Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 164. J. Stern Sass Sapphire Rough Product Portfolios and Specifications

Table 165. J. Stern Sass Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 166. J. Stern Sass Main Business

Table 167. J. Stern Sass Latest Developments

Table 168. United Sapres Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 169. United Sapres Sapphire Rough Product Portfolios and Specifications

Table 170. United Sapres Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 171. United Sapres Main Business

Table 172. United Sapres Latest Developments

Table 173. Gem Lanka International Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 174. Gem Lanka International Sapphire Rough Product Portfolios and Specifications

Table 175. Gem Lanka International Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 176. Gem Lanka International Main Business

Table 177. Gem Lanka International Latest Developments

Table 178. Regal Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 179. Regal Gems Sapphire Rough Product Portfolios and Specifications

Table 180. Regal Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 181. Regal Gems Main Business

Table 182. Regal Gems Latest Developments

Table 183. Punsiri Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 184. Punsiri Gems Sapphire Rough Product Portfolios and Specifications

Table 185. Punsiri Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 186. Punsiri Gems Main Business

Table 187. Punsiri Gems Latest Developments

Table 188. Nash Universal Ventures Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 189. Nash Universal Ventures Sapphire Rough Product Portfolios and Specifications

Table 190. Nash Universal Ventures Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 191. Nash Universal Ventures Main Business

Table 192. Nash Universal Ventures Latest Developments

Table 193. Thai Lanka Trading Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 194. Thai Lanka Trading Sapphire Rough Product Portfolios and Specifications

Table 195. Thai Lanka Trading Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 196. Thai Lanka Trading Main Business

Table 197. Thai Lanka Trading Latest Developments

Table 198. UD.R. Ceylon Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 199. UD.R. Ceylon Sapphire Rough Product Portfolios and Specifications

Table 200. UD.R. Ceylon Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 201. UD.R. Ceylon Main Business

Table 202. UD.R. Ceylon Latest Developments

Table 203. Master Cut Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 204. Master Cut Gems Sapphire Rough Product Portfolios and Specifications

Table 205. Master Cut Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 206. Master Cut Gems Main Business

Table 207. Master Cut Gems Latest Developments

Table 208. Top Gem Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 209. Top Gem Gems Sapphire Rough Product Portfolios and Specifications

Table 210. Top Gem Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 211. Top Gem Gems Main Business

Table 212. Top Gem Gems Latest Developments

Table 213. Ceylon Industries Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 214. Ceylon Industries Sapphire Rough Product Portfolios and Specifications

Table 215. Ceylon Industries Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 216. Ceylon Industries Main Business

Table 217. Ceylon Industries Latest Developments

Table 218. Sri Gems Basic Information, Sapphire Rough Manufacturing Base, Sales Area and Its Competitors

Table 219. Sri Gems Sapphire Rough Product Portfolios and Specifications

Table 220. Sri Gems Sapphire Rough Sales (g), Revenue (\$ Million), Price (US\$/g) and Gross Margin (2021-2026)

Table 221. Sri Gems Main Business

Table 222. Sri Gems Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Sapphire Rough
- Figure 2. Sapphire Rough Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Sapphire Rough Sales Growth Rate 2021-2032 (g)
- Figure 7. Global Sapphire Rough Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Sapphire Rough Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Sapphire Rough Sales Market Share by Country/Region (2025)
- Figure 10. Sapphire Rough Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Blue Sapphire
- Figure 12. Product Picture of Padparadscha
- Figure 13. Product Picture of Fancy Sapphire
- Figure 14. Product Picture of Star Sapphire
- Figure 15. Global Sapphire Rough Sales Market Share by Type in 2026
- Figure 16. Global Sapphire Rough Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Small (10 ct)
- Figure 21. Global Sapphire Rough Sales Market Share by Weight in 2026
- Figure 22. Global Sapphire Rough Revenue Market Share by Weight (2021-2026)
- Figure 23. Sapphire Rough Consumed in High-End Jewelry
- Figure 24. Global Sapphire Rough Market: High-End Jewelry (2021-2026) & (g)
- Figure 25. Sapphire Rough Consumed in Commercial Jewelry
- Figure 26. Global Sapphire Rough Market: Commercial Jewelry (2021-2026) & (g)
- Figure 27. Sapphire Rough Consumed in Industrial Use
- Figure 28. Global Sapphire Rough Market: Industrial Use (2021-2026) & (g)
- Figure 29. Sapphire Rough Consumed in Carvings & Art Objects
- Figure 30. Global Sapphire Rough Market: Carvings & Art Objects (2021-2026) & (g)
- Figure 31. Sapphire Rough Consumed in Collectors & Specimen
- Figure 32. Global Sapphire Rough Market: Collectors & Specimen (2021-2026) & (g)
- Figure 33. Sapphire Rough Consumed in Others
- Figure 34. Global Sapphire Rough Market: Others (2021-2026) & (g)
- Figure 35. Global Sapphire Rough Sale Market Share by Application (2025)
- Figure 36. Global Sapphire Rough Revenue Market Share by Application in 2025

- Figure 37. Sapphire Rough Sales by Company in 2025 (g)
- Figure 38. Global Sapphire Rough Sales Market Share by Company in 2025
- Figure 39. Sapphire Rough Revenue by Company in 2025 (\$ millions)
- Figure 40. Global Sapphire Rough Revenue Market Share by Company in 2025
- Figure 41. Global Sapphire Rough Sales Market Share by Geographic Region (2021-2026)
- Figure 42. Global Sapphire Rough Revenue Market Share by Geographic Region in 2025
- Figure 43. Americas Sapphire Rough Sales 2021-2026 (g)
- Figure 44. Americas Sapphire Rough Revenue 2021-2026 (\$ millions)
- Figure 45. APAC Sapphire Rough Sales 2021-2026 (g)
- Figure 46. APAC Sapphire Rough Revenue 2021-2026 (\$ millions)
- Figure 47. Europe Sapphire Rough Sales 2021-2026 (g)
- Figure 48. Europe Sapphire Rough Revenue 2021-2026 (\$ millions)
- Figure 49. Middle East & Africa Sapphire Rough Sales 2021-2026 (g)
- Figure 50. Middle East & Africa Sapphire Rough Revenue 2021-2026 (\$ millions)
- Figure 51. Americas Sapphire Rough Sales Market Share by Country in 2025
- Figure 52. Americas Sapphire Rough Revenue Market Share by Country (2021-2026)
- Figure 53. Americas Sapphire Rough Sales Market Share by Type (2021-2026)
- Figure 54. Americas Sapphire Rough Sales Market Share by Application (2021-2026)
- Figure 55. United States Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 56. Canada Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 57. Mexico Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 58. Brazil Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 59. APAC Sapphire Rough Sales Market Share by Region in 2025
- Figure 60. APAC Sapphire Rough Revenue Market Share by Region (2021-2026)
- Figure 61. APAC Sapphire Rough Sales Market Share by Type (2021-2026)
- Figure 62. APAC Sapphire Rough Sales Market Share by Application (2021-2026)
- Figure 63. China Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Japan Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 65. South Korea Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 66. Southeast Asia Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 67. India Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 68. Australia Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 69. China Taiwan Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 70. Europe Sapphire Rough Sales Market Share by Country in 2025
- Figure 71. Europe Sapphire Rough Revenue Market Share by Country (2021-2026)
- Figure 72. Europe Sapphire Rough Sales Market Share by Type (2021-2026)
- Figure 73. Europe Sapphire Rough Sales Market Share by Application (2021-2026)

- Figure 74. Germany Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 75. France Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 76. UK Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 77. Italy Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 78. Russia Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 79. Middle East & Africa Sapphire Rough Sales Market Share by Country (2021-2026)
- Figure 80. Middle East & Africa Sapphire Rough Sales Market Share by Type (2021-2026)
- Figure 81. Middle East & Africa Sapphire Rough Sales Market Share by Application (2021-2026)
- Figure 82. Egypt Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 83. South Africa Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 84. Israel Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Turkey Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 86. GCC Countries Sapphire Rough Revenue Growth 2021-2026 (\$ millions)
- Figure 87. Manufacturing Cost Structure Analysis of Sapphire Rough in 2026
- Figure 88. Manufacturing Process Analysis of Sapphire Rough
- Figure 89. Industry Chain Structure of Sapphire Rough
- Figure 90. Channels of Distribution
- Figure 91. Global Sapphire Rough Sales Market Forecast by Region (2027-2032)
- Figure 92. Global Sapphire Rough Revenue Market Share Forecast by Region (2027-2032)
- Figure 93. Global Sapphire Rough Sales Market Share Forecast by Type (2027-2032)
- Figure 94. Global Sapphire Rough Revenue Market Share Forecast by Type (2027-2032)
- Figure 95. Global Sapphire Rough Sales Market Share Forecast by Application (2027-2032)
- Figure 96. Global Sapphire Rough Revenue Market Share Forecast by Application (2027-2032)

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