

Super Abrasives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Product (Cubic Boron Nitride, Polycrystalline, CVD Diamonds, Nano Diamonds), By Application (Aerospace, Medical, Automotive, Construction, Electrical & Electronics, Oil & Gas, Others), By Region and Competition

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Abstracts

Global Super Abrasives Market has valued at USD7.11 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.61% through 2028. Super Abrasives, a class of materials recognized for their exceptional hardness, thermal stability, and wear resistance, find application in various cutting, grinding, drilling, and polishing operations. These remarkable substances, composed of cubic boron nitride or diamond, have become indispensable in industries where precision and superior surface finish are paramount.

The utilization of automated systems and advanced machining centers in manufacturing processes has led to an increased demand for Super Abrasives. These technologies require higher operating speeds to achieve better surface finishes, driving the need for products that can meet these performance requirements. This trend is expected to continue in the coming years, fueling the growth of the Super Abrasives market.

The outstanding properties offered by Super Abrasives, including extraordinary hardness, unparalleled performance, and extended lifespan, enable the attainment of high-quality surface finishes on hard materials. Moreover, their longevity results in longer product life and reduced machine downtime, compensating for their higher initial costs. For instance, the utilization of metal-bonded design wheels, which exhibit

superior wear resistance, can lead to shorter cycle times and longer wheel life, ultimately reducing machining costs for customers.

Diamond and cubic boron nitride (CBN) Super Abrasive products are extensively used in the aerospace industry and other industrial applications where price considerations are less significant. These industries prioritize precision in machining operations and are willing to invest in Super Abrasives despite their higher initial costs. Materials such as nickel, cast iron, and cobalt-based superalloys often require the use of these advanced abrasives to achieve the desired machining outcomes.

However, the increasing complexity of Super Abrasive technology in high-performance applications, coupled with the high initial costs involved, presents a challenge for small-scale and medium-scale companies. While industry leaders can afford substantial research operations, many unorganized players lack access to significant R&D resources. This disparity can make it difficult for smaller companies to compete in the market, especially in terms of developing products that require advanced technologies.

Key Market Drivers

Growing Demand of Super Abrasives in Automotive Industry

Super abrasives, advanced materials specifically designed for precision grinding, cutting, and polishing of hard materials, have gained immense popularity in various industries. With their remarkable hardness, thermal conductivity, and exceptional wear resistance, they offer superior performance compared to conventional abrasives.

In the automotive industry, the applications of super abrasives are vast and significant. They are extensively utilized in grinding engine components, cutting, and shaping gears, and polishing auto bodies. These materials excel in delivering high precision and accuracy, making them ideal for the manufacturing processes of complex automotive components. As automotive technology continues to evolve, the demand for precise machining and finishing grows, and super abrasives perfectly address these requirements.

Furthermore, the global shift towards electric vehicles (EVs) has further fueled the demand for super abrasives. EVs require specialized components like permanent magnet motors and lithium-ion batteries, which demand precise machining and finishing. Super abrasives, with their exceptional hardness and precision, play a vital role in meeting these specific needs.

The automotive industry also places great emphasis on the aesthetic appeal of vehicles. With the rising trend of high-quality finishes for both interiors and exteriors, the demand for super abrasives has multiplied. These materials enhance the overall aesthetic appeal and value of vehicles, contributing to a premium and refined look.

In summary, super abrasives have become indispensable in the automotive industry, enabling precise manufacturing processes, meeting the demands of electric vehicles, and enhancing the aesthetic appeal of vehicles with high-quality finishes.

Growing Demand of Super Abrasives in Medical Industry

Super abrasives are highly regarded materials known for their superior hardness, exceptional thermal conductivity, and remarkable wear resistance when compared to conventional abrasives. These remarkable properties make them the perfect choice for a wide range of applications in the medical industry.

In the medical field, precision is of utmost importance, especially when it comes to manufacturing medical devices such as surgical instruments, orthopedic implants, and dental tools. The use of super abrasives in these applications is crucial as they possess unparalleled hardness and precision. By utilizing super abrasives, manufacturers can achieve high-quality surface finishes and precise dimensions, which are critical in ensuring the safety, effectiveness, and longevity of these medical devices.

Moreover, recent advancements in orthopedic and dental treatments have led to a growing demand for personalized treatments. As a result, there is an increasing need for custom-made implants and prosthetics that require precise machining and finishing. Super abrasives, with their exceptional precision and consistency, play a crucial role in meeting these requirements and ensuring that these personalized treatments are of the highest quality.

In summary, the unique characteristics of super abrasives, including their exceptional hardness, thermal conductivity, and wear resistance, make them invaluable in the medical industry. From precision grinding and cutting of medical devices to the manufacturing of orthopedic implants and dental prosthetics, super abrasives contribute to the production of high-quality, safe, and effective medical equipment.

Key Market Challenges

Lack in Availability of Raw Materials

Super abrasives are high-performance materials that offer exceptional hardness, thermal conductivity, and wear resistance compared to conventional abrasives. These properties are derived from their unique composition, which includes raw materials such as diamond, cubic boron nitride (CBN), and silicon carbide. The production of super abrasives heavily relies on the availability of these raw materials, which are limited due to their natural occurrence.

Diamond and CBN, as key materials used in the production of super abrasives, are valuable natural resources. The extraction process of these minerals is not only complex and time-consuming but also expensive. Moreover, it is subject to strict environmental regulations, which further adds to the challenges faced by the super abrasives industry.

The prices of the raw materials required for super abrasives are prone to fluctuation due to various factors, including changes in demand and supply, geopolitical tensions, and economic uncertainties. This price volatility can significantly impact production costs, thereby affecting the profitability of super abrasive manufacturers.

Furthermore, many countries heavily rely on imports for the raw materials needed in the production of super abrasives. Any disruption in international trade, such as trade disputes or logistical issues, can have a direct impact on the availability of these materials. This dependence on imports adds an additional layer of complexity to the already intricate supply chain, posing a significant challenge to the super abrasives market.

Given these factors, the super abrasives industry faces multiple hurdles in maintaining a stable supply of raw materials and managing production costs. Overcoming these challenges requires strategic planning, efficient resource management, and ongoing innovation in the field of super abrasive manufacturing.

Key Market Trends

Increase in Electronics and Semiconductor Manufacturing

Super abrasives are materials recognized for their superior hardness, thermal conductivity, and wear resistance compared to conventional abrasives. These exceptional properties make them the go-to-choice for various applications in the

electronics and semiconductor manufacturing industry, where precision and reliability are paramount. They are extensively used in critical processes such as precision grinding, cutting, and polishing of delicate electronic components and semiconductor wafers, ensuring the highest level of quality and performance.

The electronics industry is currently witnessing an unprecedented surge in the demand for more innovative and efficient electronic devices. From smartphones and laptops to advanced medical devices and electric vehicles, the world is relying heavily on the power of semiconductors and electronic components to drive technological advancements. As these devices become increasingly sophisticated, the demand for super abrasives, which play a crucial role in manufacturing these components, continues to grow exponentially.

The ongoing trend of miniaturization in electronics is another significant factor driving the demand for super abrasives. As electronic components become smaller and more intricate, the need for precision manufacturing becomes critical. Super abrasives, with their extraordinary ability to deliver high precision grinding and cutting, are ideally suited to meet these ever-evolving demands, ensuring the seamless production of miniature yet powerful electronic devices.

Simultaneously, the semiconductor industry is experiencing substantial growth, fueled by continuous technological advancements and the unstoppable wave of digitalization. Semiconductors serve as the building blocks of almost all electronic devices, powering everything from smartphones to artificial intelligence systems. The intricate manufacturing process of semiconductors involves multiple stages of precision grinding and polishing, where the precise performance of super abrasives plays a vital role in achieving the desired results.

In conclusion, the increasing demand for super abrasives in the electronics and semiconductor manufacturing industry is not just a passing trend; it is a significant and lasting phenomenon that is reshaping the global super abrasives market. In an increasingly digital and interconnected world, where electronic devices continue to evolve at an unprecedented pace, the role of super abrasives in manufacturing these components is set to become even more critical. This trend is poised to continue driving the growth and innovation in the super abrasives market for the foreseeable future, solidifying its position as an indispensable technology in the realm of precision manufacturing.

Segmental Insights

Product Insights

Based on the category of product, the CVD Diamonds segment emerged as the dominant player in the global market for Super Abrasives in 2022. The increase in demand for vitrified diamond tools stems from the growing need for cutting and grinding equipment in various industries. Diamond, known for its exceptional properties, offers numerous advantages such as anti-adhesion, wear resistance, low friction coefficient, and chemical inertness. These qualities contribute to the rising demand for diamond in the super abrasives market, where vitrified diamond tools find extensive use in applications like cutting tools and precision tooling.

Moreover, synthetic diamonds have gained preference over natural diamonds due to their high efficiency. The exceptional properties and advantages associated with diamonds are driving the diamond segment of the super abrasives market, as industries recognize the value and performance benefits offered by these remarkable materials.

Application Insights

The Electrical & Electronics segment is projected to experience rapid growth during the forecast period. Super abrasives, known for their exceptional processing capabilities, are widely used in various industries. They can effectively handle a wide range of materials, including semi-conductor materials, ceramics, carbide alloys, copper, copper alloys, aluminum, resin, and rubber. In India, the electronics and electrical industry has witnessed remarkable growth, with a market size of US\$400 billion in 2020, as reported by the Indian Brand Equity Foundation. This surge in the industry is expected to further drive the demand for super abrasives. Notably, super abrasives play a crucial role in the production of printed circuit boards (PCBs) used in electronic devices such as desktop computers, home theater systems, laptops, smartphones, and more. As a result, the electrical and electronics industry has witnessed a significant increase in the utilization of super abrasives, paving the way for enhanced productivity and efficiency in this sector.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Super Abrasives Market in 2022, holding the largest market share in terms of value. The increase in the need for cost-effective and innovative procedures, such as automated systems, robotics, and sensors, in countries like India, China, and South Korea has significantly contributed to

the growing demand for super abrasives in the region. This surge in demand can be attributed to various factors, including the rise in production and sales of electronic products in countries like China and India. These countries have witnessed a substantial increase in middle-class income, leading to a change in lifestyles among the working class and rapid urbanization.

Furthermore, the exponential growth in the production of electronics in the APAC region has played a crucial role in driving the expansion of the super abrasives market. In fact, China alone is projected to reach a staggering value of US\$152.7 billion in the electronics products market by the year 2020.

This remarkable growth in the market can be attributed to the increasing adoption of super abrasives in various industries, including automotive, electronics, and manufacturing. The superior performance and durability offered by super abrasives make them a preferred choice for precision grinding, polishing, and cutting applications.

Overall, the rising demand for cost-effective and technologically advanced solutions, coupled with the growth of key industries in the APAC region, is fueling the expansion of the super abrasives market, presenting lucrative opportunities for market players in the coming years.

Key Market Players

Element Six (UK) Limited

Henan Huanghe Whirlwind Co., Ltd.

ILJIN DIAMOND CO., LTD

Saint-Gobain S.A.

SHOWA DENKO K.K.

Zhengzhou ZZDM SUPERABRASIVES CO., LTD.

Asahi Diamond Industrial Co., Ltd.

3M Company

NORITAKE CO., LIMITED

Hyperion Materials & Technologies, Inc.

Report Scope:

In this report, the Global Super Abrasives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Super Abrasives Market, By Product:

Cubic Boron Nitride

Polycrystalline

CVD Diamonds

Nano Diamonds

Super Abrasives Market, By Application:

Aerospace

Medical

Automotive

Construction

Electrical & Electronics

Oil & Gas

Others

Super Abrasives Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Super Abrasives Market.

Available Customizations:

Global Super Abrasives Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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