



Global and China Superhard Material and Product Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Customs, and National Bureau of Statistics etc.

Abstract

The superhard material industry chain mainly includes three sectors: monocrystalline superhard materials, composite superhard materials and superhard material tools. Now, China is the world's largest monocrystalline superhard material producer, but it is still backward in the development of composite superhard materials compared with advanced foreign countries.

In the field of monocrystalline superhard materials, China produced 11 billion carats of synthetic diamond in 2011, accounting for 90% of the global output; the market shares were mainly mastered by ZhongNan Diamond, Huanghe Whirlwind and Zhengzhou Sino-crystal Diamond.

As for composite superhard materials, the global medium & high-end composite superhard materials are mainly produced by DI, E.S and US Synthetic. Chinese polycrystalline superhard material market valued about RMB9 billion, and the main enterprises include Huanghe Whirlwind, SF Diamond, Zhengzhou New Asia Superhard Material Composite, and Henan Yalong Diamond Tools.

Superhard material tool manufacturing enterprises are throughout the world. Saint Gobain, Tyrolit and other well-known manufacturers are the first-class enterprises. In China, Kingdream, Monte-Bianco Diamond Applications and Bosun Tools have large scale.

The report covers the following aspects:

- Diamond output, output distribution, corporate competition pattern in China;
- Scale and competition in the global and Chinese composite superhard material markets;
- scale and competition patterns in cutter PDC, oilfield PDC, mining PDC, and wire drawing die blank segments;
- Overview of Chinese superhard material tool market and major companies;
- Production and operation of 8 global superhard material and product manufacturing enterprises (including DI, E.S, Saint Gobain) and 13 Chinese enterprises (including ZhongNan Diamond, Huanghe Whirlwind, Bosun Tools).

ZhongNan Diamond has the synthetic diamond capacity of 6 billion carats / year, its output accounts for 44.5% of China's total, and it is China's largest diamond manufacturer. In recent years, ZhongNan Diamond has expanded downstream PDC products based on its own diamond micro-powder.

SF Diamond is China's largest polycrystalline diamond enterprise. In the future, it will focus on cutter PDC and oil drill bit PDC. SF Diamond can produce 50.8mm cutter PDC in large scale. At the same time, it is the world's third largest polycrystalline diamond wire drawing die blank manufacturer.

The diamond tools produced by Bosun Tools are mainly applied to construction, building materials processing and decoration, especially they have competitive advantages in ceramic processing. Bosun Tools has subsidiaries in the United States, Canada and Brazil. In 2011, the company invested RMB239 million in building a production base in Thailand for the production of diamond saw blades; it is expected that the capacity will be realized by the end of 2012.

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