IDEX
DIAMOND TRADING NETWORK

TACY'S 2019
DIAMOND PIPELINE

IN US$ BILLION | PREPARED BY PHAROS BEAM CONSULTING LLP

DIRECT COSTS OF ROUGH PRODUCTION	7.2
ROUGH PRODUCTION VALUE	13.68
MINES SALES TO INDUSTRY	12.55
NET ROUGH USED FOR LOCAL PRODUCTION	13.69
VALUE OF POLISHED PRODUCTION	17.13
POLISHED SALES	17.93
VALUE OF RECYCLED POLISHED	0.35
VALUE OF DIAMOND CONTENT IN RETAIL SALES (INCLUDING SYNTHETICS)	20.22
RETAIL SALES OF DIAMOND JEWELRY	76.05

DIRECT COST OF PRODUCTION

AUSTRALIA	DRC	BOTSWANA	RUSSIA	ZIMBABWE	OTHERS
0.16	0.25	3.43	4.14	0.16	0.30

ANGOLA	NAMIBIA	S. AFRICA	CANADA	LESOTHO
1.29	1.03	0.9	1.72	0.30

INDEPENDENT PRODUCERS	ALROSA	DE BEERS
5.28	3.27	4.0

BELGIUM	ISRAEL	INDIA	USA	S. AFRICA	CHINA	RUSSIA	OTHERS
0.14	0.42	10.72	0.13	0.71	0.65	0.26	0.46

BELGIUM	ISRAEL	INDIA	USA	S. AFRICA	CHINA	RUSSIA	OTHERS
0.18	0.53	13.13	0.16	0.86	0.84	0.34	0.59

Including stock value depreciation

ROUGH GEM SYNTHETICS

USA, SINGAPORE, MALAYSIA, RUSSIA & OTHERS
≥ 0.7

POLISHED SYNTHETICS
≥ 1

VALUE OF RECYCLED DIAMONDS (CONSUMER SELL BACKS) RE-ENTERING PIPELINE

USA & CANADA	EUROPE	HK/CHINA & TAIWAN	JAPAN	INDIA	GULF & TURKEY	REST OF WORLD
50%	9%	12%	6%	7%	8%	8%
10.14	1.87	2.45	1.12	1.41	1.55	1.68

USA & CANADA	EUROPE	HK/CHINA & TAIWAN	JAPAN	INDIA	GULF & TURKEY	REST OF WORLD
39.12	5.91	10.59	3.84	5.13	6.25	4.61

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