GEMSTONES[1]

(Data in million dollars unless otherwise specified)

Domestic Production and Use: The combined value of U.S. natural and synthetic gemstone output in 2025 was an estimated $47 million, a decrease of 30% compared with that in 2024. Domestic natural gemstone production included agate, beryl, coral, diamond, garnet, jade, jasper, opal, pearl, quartz, sapphire, shell, topaz, tourmaline, turquoise, and many other gem materials. In descending order of production value, Arizona led the Nation in natural gemstone production, followed by Oregon, California, Nevada, Montana, and Maine. These six States accounted for 68% of the natural gemstone production in the United States. Synthetic gemstones were manufactured by five companies in North Carolina, California, Oregon, South Carolina, and Arizona, in descending order of production value. U.S. synthetic gemstone production decreased by 35% compared with that in 2024. Major gemstone end uses were carvings, gem and mineral collections, and jewelry.

Salient Statistics—United States:	**2021**	**2022**	**2023**	**2024**	**2025[e]**
Production:[2]					
Natural[3]	9.48	9.95	10.0	9.25	9.4
Laboratory-created (synthetic)	79.3	87.1	64.6	56.8	37
Imports for consumption	24,600	28,700	24,200	19,600	11,000
Exports, excluding reexports	992	1,890	3,610	2,110	1,700
Consumption, apparent[4]	23,700	26,900	21,300	17,600	9,300
Price	Variable, depending on size, type, and quality				
Employment, mine, number[e]	1,100	1,100	1,100	1,100	1,100
Net import reliance[5] as a percentage of apparent consumption	99	99	99	99	99

Recycling: Gemstones are often recycled as estate jewelry, reset, or recut, but this report does not account for those resales.

Import Sources (2021–24, by value): Diamond: India, 46%; Israel, 27%; Belgium, 11%; South Africa, 4%; and other, 12%. Diamond imports accounted for an average of 79% of the total value of gem imports in 2025.

Tariff: Item	**Number**	**Normal Trade Relations 12–31–25**
Coral and similar materials, unworked	0508.00.0000	Free.
Imitation gemstones	3926.90.4000	2.8% ad valorem.
Imitation pearls and imitation pearl beads, not strung	7018.10.1000	4% ad valorem.
Imitation gemstones	7018.10.2000	Free.
Pearls, natural, graded and temporarily strung	7101.10.3000	Free.
Pearls, natural, other	7101.10.6000	Free.
Pearls, cultured	7101.21.0000	Free.
Diamonds, unworked or sawn	7102.31.0000	Free.
Diamonds, cut, 0.5 carat or less	7102.39.0010	Free.
Diamonds, cut, more than 0.5 carat	7102.39.0050	Free.
Other nondiamond gemstones, unworked	7103.10.2000	Free.
Other nondiamond gemstones, uncut	7103.10.4000	10.5% ad valorem.
Rubies, cut	7103.91.0010	Free.
Sapphires, cut	7103.91.0020	Free.
Emeralds, cut	7103.91.0030	Free.
Other nondiamond gemstones, cut	7103.99.1000	Free.
Other nondiamond gemstones, worked	7103.99.5000	10.5% ad valorem.
Synthetic diamonds, unworked or roughly shaped	7104.21.0000	3% ad valorem.
Synthetic gemstones, unworked or roughly shaped	7104.29.0000	3% ad valorem.
Synthetic diamonds, cut but not set	7104.91.1000	Free.
Synthetic diamonds, other	7104.91.5000	6.4% ad valorem.
Synthetic gemstones, worked or cut but not set	7104.99.1000	Free.
Synthetic gemstones, other	7104.99.5000	6.4% ad valorem.

Depletion Allowance: 14% (domestic and foreign).

Government Stockpile: None.

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GEMSTONES

Events, Trends, and Issues: Total world diamond production in 2025 was essentially unchanged from that in 2024. In 2025, Russia was the world's leading gem-grade diamond producer, with approximately 30% of total global production by volume. The United States was one of the world's leading markets for polished diamonds. During 2025, sanctions against Russia and the Russian state-owned diamond-mining company by the U.S. Government, the European Union, and the Group of Seven (representatives of the seven leading industrial nations) remained in effect. These sanctions prohibited the import of rough and finished gem-grade diamonds from Russia, including diamonds processed in third countries, to limit Russia's ability to fund its conflict with Ukraine.

The global natural diamond market continued the downturn that began in early 2023 and has especially affected the lower end (one carat or less) of the commercial segment. This downturn affected the entire diamond pipeline. Fewer jewelry sales led to a decline in trading of polished diamonds and a buildup of midstream inventory, which in turn led to a decline in diamond rough sales and lower prices, affecting the ability of mining companies to maintain operations. The slowdown resulted from decreased demand for luxury goods owing to global inflation, excess inventory, and increased popularity of less expensive synthetic diamonds.

In July 2025, a leading U.S. synthetic diamond company in Oregon ceased operations, which was a major reason for the 35% decrease in U.S. production. U.S. imports for consumption of gemstones during 2025 were valued at about $11 billion, which was a 44% decrease compared with $19.6 billion in 2024. The decrease in U.S. total gemstone imports combined with the value of domestic exports contributed to a 47% decrease in apparent consumption to a value of $9.4 billion in 2025 compared with $17.6 billion in 2024. The United States was one of the leading global markets in terms of sales and was expected to continue as a dominant global gemstone consumer.

World Gem-Quality Natural Diamond Mine Production and Reserves:[6] Significant revisions were made to the 2024 production for Angola, Botswana, Canada, Ghana, Lesotho, and Tanzania based on company and Government reports. Reserves for Russia, South Africa, and Zimbabwe were revised based on company and Government reports.

	Mine production		Reserves[7]
	2024	2025[e]	
United States	—	—	NA
Angola	12,600	13,000	150,000
Botswana	12,700	13,000	250,000
Canada	13,300	13,000	110,000
Congo (Kinshasa)	1,960	2,000	150,000
Ghana	333	330	NA
Lesotho	696	700	NA
Namibia	2,320	2,300	NA
Russia	20,900	21,000	750,000
Sierra Leone	459	460	NA
South Africa	2,140	2,100	87,000
Tanzania	318	320	NA
Zimbabwe	529	530	56,000
Other countries	324	320	120,000
World total (rounded)	68,600	69,000	>2,000,000

World Resources:[7] Most diamond ore bodies have a diamond content that ranges from less than 1 carat to about 6 carats per ton of ore. The major diamond reserves are in southern Africa, Australia, Canada, and Russia.

Substitutes: Glass, plastics, and other materials are substituted for natural gemstones. Synthetic gemstones (manufactured materials that have the same chemical and physical properties as natural gemstones) are common substitutes. Simulants (materials that appear to be gems but differ in chemical and physical characteristics) also are frequently substituted for natural gemstones.

[e]Estimated. NA Not available. — Zero.

[1]Excludes industrial diamond and industrial garnet. See the Diamond (Industrial) and Garnet (Industrial) chapters.

[2]Estimated minimum production.

[3]Includes production of freshwater shell.

[4]Defined as production (natural and synthetic) + imports (natural and synthetic) – exports (natural and synthetic, excluding reexports).

[5]Defined as imports (natural and synthetic) – exports (natural and synthetic, excluding reexports).

[6]Data in thousands of carats of natural diamond.

[7]See Appendix C for resource and reserve definitions and information concerning data sources.