

# **Botswana Didn't Just Protect Its Diamonds. It Redefined What a Diamond Means.**

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I've spent over forty years behind a gemological bench. I've graded thousands of stones, traveled to mining regions most people will never see on a map, and watched this industry cycle through more "existential crises" than I can count. But what Botswana is doing right now is not a cycle. It's a rupture, and it matters far beyond southern Africa.

A few weeks ago, I came across a conversation on LinkedIn started by Mecktilder M. M., a mining policy thinker whose work I follow closely. She was writing about something that had come out of Mining Indaba 2026 in Cape Town, specifically about a series of exchanges with Koolatotse Koolatotse, COO of Debswana, and the broader moves being championed by Minister Bogolo Joy Kenewendo. The gist was this: Botswana is rewriting its entire diamond story, not by lowering prices or copying what the synthetics market does, but by drawing a hard line in the sand about what a natural diamond actually is.

And one of the most concrete moves? Pushing for the 4Cs grading framework to remain exclusive to natural diamonds.

That's not a marketing gimmick. That's structural.

## **The GIA Decision and Why It Changed Everything**

When the Gemological Institute of America announced in 2025 that it would stop applying the traditional 4Cs (Cut, Colour, Clarity, Carat) to lab-grown diamonds and replace them with a simplified pass/fail quality assessment, a lot of people in the trade shrugged. "Makes sense," they said, "95% of lab-grown stones fall in the same narrow quality window anyway." And that's true. When you can manufacture a D-flawless stone on demand, the grading system built to evaluate geological rarity becomes meaningless.

But from where I sit, that decision carried a much heavier weight. Because the 4Cs aren't just a grading tool. They're a language. They're how we communicate value, how we compare one stone against another across borders, across decades, across generations. When Botswana's

government pushed to ensure that language stays attached to natural diamonds only, they weren't protecting a brand. They were protecting a meaning.

Minister Kenewendo has been remarkably clear about this. Botswana succeeded in ensuring that international trading codes and grading standards now formally distinguish between natural and synthetic stones. One gets measured in carats. The other in grammes. That distinction sounds small. It isn't.

### **The Real Disruption Isn't in the Lab. It's in the Narrative.**

Let me be direct. Lab-grown diamonds have captured roughly 20% of the market, and among younger buyers, more than half of engagement ring center stones sold in 2025 were lab-grown. The price undercuts natural stones by 30 to 40%. These are the numbers and they're real. But numbers only tell part of the story.

The lab-grown market is already showing signs of the problem that unlimited supply inevitably creates: collapsing prices. When any product can be manufactured without constraint, its value trajectory points in one direction. That's not speculation; it's economics. Meanwhile, questions persist about the energy footprint of CVD and HPHT production, much of which runs on grids that are far from green. The sustainability narrative around synthetics deserves more scrutiny than it currently receives.

But here's the deeper issue, and it's what I said publicly in the conversation that followed Mecktilder's post: we're confusing two completely different questions. "Does it look the same?" is a materials science question. "Does it mean the same?" is a human question. And the answer to the second one is no, and the gap is widening, not closing.

The diamond industry spent a century telling people that a diamond equals love, status, permanence. That campaign worked brilliantly for a while. But the generation now entering the market, Gen Z, has heard those slogans their whole lives, and they're not buying the story anymore. Not because they don't value beauty or commitment, but because they've redefined what status means.

### **Gen Z Doesn't Want Status. They Want Stewardship.**

This is the part that most industry analysts get wrong, and it's what I argued in that LinkedIn thread. The common take is that Gen Z gravitates toward lab-grown diamonds because they're cheaper and "good enough." That's partly true, but it's a shallow reading. What the data actually shows is more nuanced: younger consumers want to know that their purchase connects to

something real. They want provenance. They want impact. They want to know that the money they spent didn't just buy a crystal but actually touched someone's life in a place like Gaborone or Orapa.

The irony is thick: natural diamonds, the ones with genuine supply chains reaching into communities in Botswana, Namibia, and Sierra Leone, actually have a better story to tell on the sustainability front than most people assume. Diamonds account for roughly 25% of Botswana's GDP and 75% of its foreign exchange earnings. The Debswana partnership between De Beers and the Botswana government has funded schools, hospitals, and infrastructure for decades. When you buy a Botswana diamond, that purchase is tangibly connected to a nation's development. A lab-grown stone grown in a reactor in Surat or Shanghai carries no such connection.

But the natural diamond industry has done an abysmal job of communicating this. For too long, the response to lab-grown disruption has been defensive: "ours are real, theirs aren't." That framing is losing, because it sounds like insecurity, not confidence. And Gen Z can smell insecurity from a mile away.

What I said in that conversation, and what I'll repeat here, is that the narrative needs to shift from status to stewardship. Stop telling young people that a natural diamond makes them special. Start showing them that buying one makes a difference. Not through slick advertising, but through traceable, verifiable, on-the-ground impact. If natural diamonds can prove their role in communities like those in Botswana, that becomes what I called "impact rarity," a value proposition that no laboratory can replicate.

## **What Botswana Understands That the West Doesn't**

Botswana is not sitting still. Minister Kennewendo has acknowledged openly that the country needs to diversify its mineral exploration, only about 30% of Botswana's territory has been properly surveyed for non-diamond minerals. Debswana cut production by 40% in 2025. The economy contracted by 3% in 2024 and the recession stretched into 2025. These are real numbers with real human consequences.

But instead of panicking and trying to compete with synthetics on price, which would be suicidal, Botswana is doing something far smarter: it's competing on identity. The push to reserve the 4Cs for natural diamonds, the legal framework changes distinguishing natural from synthetic at the regulatory level, the investment in origin branding. These are not desperate moves. They're strategic ones.

Mecktilder M. M. framed it well in her posts: Botswana is repositioning natural diamonds as premium through story, not through price. That's exactly right. And it echoes something I've observed for years in my own lab. When a client brings in a natural sapphire from Kashmir or a Colombian emerald with a garden of inclusions that tells the story of its geological formation, they're not buying a chemistry report. They're buying a piece of the earth's biography. The same logic applies to diamonds, but only if the industry has the courage to lean into it.

## **The Path Forward: Authenticity Over Marketing**

I'll end with something I feel strongly about. The natural diamond industry does not need more vigorous marketing. It does not need another celebrity campaign or a catchier slogan. What it needs is authenticity, and that's the one thing you cannot manufacture.

I think a significant portion of the industry has lost touch with why people fall in love with gemstones in the first place. It was never about the 4Cs on a certificate. It was about the feeling of holding something that took a billion years to form, something that traveled from 150 kilometers beneath the earth's surface to end up in your hand. That's not a marketing pitch. That's geology. That's reality.

Botswana seems to understand this better than most Western diamond houses. And as someone who has spent his career evaluating stones and watching markets shift, I find that encouraging. The countries that mine natural diamonds have every right to protect their product with rigorous grading standards, clear regulatory distinctions, and honest storytelling. What they don't have is time. The window to reframe this narrative is open, but it won't stay open forever.

Gen Z isn't lost to natural diamonds. But they need a reason to care, a reason that goes deeper than tradition for tradition's sake. Give them stewardship. Give them traceability. Give them the knowledge that their purchase built a school in Botswana or funded geological research in Namibia. That's the ultimate aesthetic, and no reactor can grow it.

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