

China Jewelry Industry Report, 2013-2016

Jun. 2014

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 Company Reports, and National Bureau of Statistics of China etc.

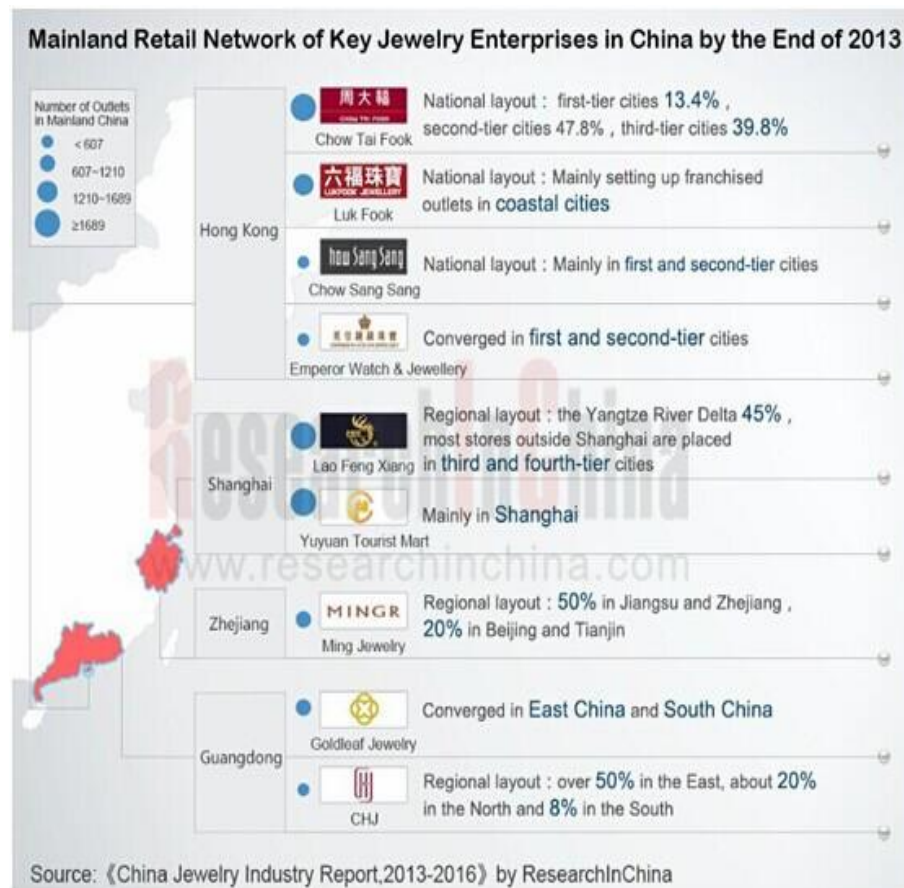
Abstract

In recent years, jewelry consumption has kept increasing with the people's improved affordability and consumption level. In 2013, the global jewelry sales achieved USD184 billion, representing a year-on-year jump of 26.03% , accounting for 57.86% of the global luxury goods sales.

Mainland China is a major jewelry consumer in the world. In 2013, the jewelry sales in Chinese Mainland approximated USD75.8 billion (USD1=RMB6.2), equivalent to 41.2 % of the global consumption.

In Mainland China, the gold jewelry consumption accounts for about 50% of the total jewelry consumption. In 2013, two gold price slumps triggered spending spree; as a result, Mainland China's gold jewelry sales volume increased significantly by 42.5% to 717 tons in 2013.

In addition to meeting local demand, Mainland China also exports considerable jewelry. In 2013, it exported the jewelry with total value of USD49.06 billion, up 10.5% year on year. Hong Kong is a major destination, importing the jewelry worth USD41.97 billion (up 7.44% year on year) from Mainland China in 2013, and accounting for 86% of Mainland China's total export value.



Currently, Chow Tai Fook, Lao Feng Xiang, Shanghai Yuyuan Tourist Mart, Chow Sang Sang and Luk Fook have become the leading brands in China (including Mainland China and Hong Kong). In 2013, Chow Tai Fook occupied the highest share 8.63% in the Chinese market (in terms of sales revenue), followed by Lao Feng Xiang with 5.34 %.

Chow Tai Fook: In recent years, Chow Tai Fook has highlighted the development of the retail network in second, third and fourth-tier cities of Mainland China. More than 65% of new stores opened by the company in 2013 are located in third-tier (or below) cities.

Lao Feng Xiang: Distributors and franchisees occupy high proportions. By the end of 2013, there had been 2,624 sales outlets (an increase of 323 year on year), including 1,550 distributors (rising by 162) and 916 franchisees (ascending by 153).

Shanghai Yuyuan Tourist Mart: In May 2013, Shanghai Yuyuan Tourist Mart merged "Laomiao Gold" and "Yayi Jewelry" into Shanghai Yuyuan Gold Jewellery Group Limited whose sales revenue increased by 14% to reach RMB20.57 billion.

Chow Sang Sang: Chow Sang Sang adopts the self-operation mode. In 2013, it opened 32 new stores in Yancheng of Jiangsu, Huzhou of Zhejiang, Datong of Shanxi, Weifang of Shandong and other cities; it added a new store in Tuen Mun V-City, Mong Kok and Jordan of Hong Kong each; it closed a branch in Taiwan while opening another two new stores.

The report highlights the following:

- ✘ Global jewelry consumption, raw material markets, brand enterprises, etc.;
- ✘ Status quo, sales models, regional market structure and development trends of China jewelry industry;
- ✘ Production, processing, marketing, export and competition pattern of China jewelry industry;
- ✘ Supply and demand of gold, platinum, diamond and other jewelry market segments in China;
- ✘ Operation and sales network of 5 Hong Kong jewelry companies and 7 Mainland Chinese enterprises.

1. Overview of Jewelry

- 1.1 Definition and Classification
- 1.2 Industry Chain
- 1.3 Industrial Characteristics

2. Status Quo of Global Jewelry Industry

- 2.1 Market Overview
- 2.2 Main Raw Material Market
 - 2.2.1 Gold
 - 2.2.2 Silver
 - 2.2.3 Platinum
- 2.3 Major Brands

3. Status Quo of China Jewelry Industry

- 3.1 Status Quo
- 3.2 Development Potential
- 3.3 Influencing Factors
 - 3.3.1 Favorable Factors
 - 3.3.2 Adverse Factors
- 3.4 Development Trend
 - 3.4.1 Materials
 - 3.4.2 Consumption

4. Chinese Jewelry Market

- 4.1 Production and Processing
 - 4.1.1 Procurement of Raw Materials
 - 4.1.2 Production Base
- 4.2 Marketing

- 4.2.1 Market Scale
- 4.2.2 Consumption Structure
- 4.3 Import & Export
 - 4.3.1 Import
 - 4.3.2 Export
- 4.4 Competition Pattern
 - 4.4.1 Ranking
 - 4.4.2 Market Share
 - 4.4.3 Operational Indicators

5. Jewelry Market Segments in China

- 5.1 Gold Jewelry
 - 5.1.1 Output
 - 5.1.2 Consumption
 - 5.1.3 Market
 - 5.1.4 Price
- 5.2 Platinum Jewelry
 - 5.2.1 Demand
 - 5.2.2 Market
- 5.3 Diamond Jewelry
 - 5.3.1 Supply & Demand
 - 5.3.2 Import & Export
 - 5.3.3 Market
- 5.4 Pearl Jewelry
 - 5.4.1 Supply & Demand
 - 5.4.2 Market
- 5.5 Jade Jewelry
- 5.6 Silver Jewelry

- 5.6.1 Supply & Demand
- 5.6.2 Market

6. Regional Jewelry Markets in China

- 6.1 Regional Pattern
- 6.2 Main Regions
 - 6.2.1 Guangdong
 - 6.2.2 Shanghai
 - 6.2.3 Beijing
 - 6.2.4 Shandong
 - 6.2.5 Yunnan

7. Jewelry Sales Modes and Channels in China

- 7.1 Sales Modes
 - 7.1.1 Overview
 - 7.1.2 Sales Modes of Key Companies
- 7.2 Sales Channels
 - 7.2.1 Overview
 - 7.2.2 Stores
 - 7.2.3 Internet

8. Key Jewelry Enterprises in Hong Kong, China

- 8.1 Chow Tai Fook Jewelry Group Limited
 - 8.1.1 Profile
 - 8.1.2 Operation
 - 8.1.3 Revenue Structure
 - 8.1.4 Gross Margin
 - 8.1.5 Sales Network

8.2 Chow Sang Sang Holding International Ltd

- 8.2.1 Profile
- 8.2.2 Operation
- 8.2.3 Revenue Structure
- 8.2.4 Gross Margin
- 8.2.5 Sales Network

8.3 Luk Fook Holdings (International) Limited

- 8.3.1 Profile
- 8.3.2 Operation
- 8.3.3 Revenue Structure
- 8.3.4 Gross Margin
- 8.3.5 Sales Network

8.4 Tse Sui Luen Jewelry (International) Limited.

- 8.4.1 Profile
- 8.4.2 Operation
- 8.4.3 Gross Margin

8.5 Emperor Watch & Jewelry Ltd.

- 8.5.1 Profile
- 8.5.2 Operation
- 8.5.3 Revenue Structure
- 8.5.4 Gross Margin
- 8.5.5 Sales Network

9. Key Jewelry Enterprises in Mainland China

9.1 Lao Feng Xiang Co., Ltd.

- 9.1.1 Profile
- 9.1.2 Operation
- 9.1.3 Revenue Structure

9.1.4 Gross Margin

9.1.5 Sales Network

9.2 Shanghai Yuyuan Tourist Mart Co., Ltd.

- 9.2.1 Profile
- 9.2.2 Operation
- 9.2.3 Revenue Structure

9.2.4 Gross Margin

9.2.5 Sales Mode

9.3 Zhejiang Ming Jewelry Co., Ltd.

- 9.3.1 Profile
- 9.3.2 Operation
- 9.3.3 Production and Sales
- 9.3.4 Revenue Structure
- 9.3.5 Gross Margin
- 9.3.6 Sales Network

9.4 Eastern Gold Jade Co., Ltd.

- 9.4.1 Profile
- 9.4.2 Operation
- 9.4.3 Revenue Structure
- 9.4.4 Gross Margin
- 9.4.5 Sales Mode
- 9.4.6 Competitive Edge

9.5 Goldleaf Jewelry Co., Ltd.

- 9.5.1 Profile
- 9.5.2 Operation
- 9.5.3 Revenue Structure
- 9.5.4 Gross Margin
- 9.5.5 Sales Network

9.6 Guangdong CHJ Industry Co., Ltd.

- 9.6.1 Profile
 - 9.6.2 Operation
 - 9.6.3 Production and Sales
 - 9.6.4 Revenue Structure
 - 9.6.5 Gross Margin
 - 9.6.6 Sales Network
 - 9.6.7 Development Strategy
- #### 9.7 Tesiro Jewelry Inc
- 9.7.1 Profile
 - 9.7.2 Operation
 - 9.7.3 Revenue Structure
 - 9.7.4 Gross Margin
 - 9.7.5 Sales Network

10. Summary and Forecast

- 10.1 Market
- 10.2 Enterprises

- Jewelry Industry Chain
- Jewelry Consumption Structure of the United States, 2013
- Jewelry Consumption Structure of UK, 2013
- Jewelry Consumption Structure of India, 2013
- Global Jewelry Sales,2000-2015E
- Global Gold Supply, 2003-2013
- Global Gold Demand for Jewelry, 2003-2013
- Global Gold Jewelry (by Country/Region) Demand Structure, 2013
- Global Gold Price Trend, 2013-2014
- Global Silver Supply, 2003-2013
- Global Silver Demand Structure, 2013
- Global Silver Demand for Jewelry, 2003-2013
- Global Silver Price Trend, 2013-2014
- Global Platinum Supply, 2003-2013
- Global Platinum (by Region) Supply Structure, 2013
- Global Platinum (by Region) Demand Structure, 2013
- Global Platinum (by Business) Demand Structure, 2013
- Global Platinum Demand for Jewelry, 2003-2013
- Global Platinum Demand for Jewelry (by Country/Region), 2003-2013
- Global Platinum Price Trend, 2013-2014
- Growth Rate of Retail Sales in Wholesale and Retail Industries above Limits in China, 2007-2013
- Market Demand Structure of Jewelry in China
- China's Per Capita GDP, 2000-2013
- Per Capita Disposable Income of China's Urban and Rural Residents, 2006-2016E
- Wedding Consumption Structure in China

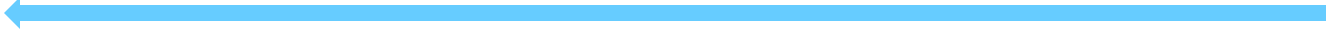
- 
- Number of Marriage Registers in China, 2006-2013
 - Precious Metal Trade Volume and Value in China, 2013
 - China's GDP Growth Rate, 2006-2016E
 - Average Wage of Workers in China, 2002-2012
 - Major Jewelry Processing & Trade Bases in China
 - Jewelry & Jade Featured Industry Bases in China
 - Jewelry Sales in Mainland China, 2007-2016E
 - Jewelry Sales and Growth Rate in Hong Kong, 2007-2016E
 - Jewelry Consumption Structure in Mainland China, 2013
 - Total Export-Import Value of Jewelry in China, 2007-2013
 - Import Value of Jewelry in China, 2008-2013
 - Import Value Structure of Jewelry in China (by Country/Region), 2013
 - Export Value of Jewelry in China, 2008-2013
 - Export Value Structure of Jewelry in China (by Product), 2013
 - Export Value and Proportions of Jewelry in China (by Country/Region), 2013
 - Export Value and Proportions of Jewelry in China (by Type of Enterprise), 2013
 - Export Value and Proportions of Jewelry in China (by Province & City), 2013
 - Jewelry Brand Orientation in China
 - Major Jewelry Brands in China
 - Ranking of Jewelry Brand Value in China, 2013
 - Market Share of Major Jewelry Retailers in China, 2013
 - Market Share of Major Jewelry Retailers in Mainland China, 2013
 - Comparison of Major Jewelry Retailers in China by Revenue Growth Rate, 2013
 - Comparison of Major Jewelry Retailers in China by Network Expansion Growth Rate, 2009-2013
 - China's Gold Supply Structure, 2013

- 
- China's Gold Output, 2007-2013
 - Gold Consumption in China, 2007-2013
 - Gold Consumption Structure in China, 2013
 - Gold Jewelry Consumption in China, 2007-2013
 - Gold (Au9995) Spot Closing Price in China, 2012-2014
 - Gold Jewelry's Gross Margin of Major Jewelry Retailers in China, 2011-2013
 - Platinum Demand and Growth Rate in China, 2002-2013
 - Global Platinum Demand Structure (by Sector), 2013
 - Global and China Demand for Platinum Jewelry, 2002-2013
 - Average Spot Price of Platinum (Pt9995) in China, 2012-2014
 - International Market Price of Diamond, 2007-2013
 - Trading Volume of Diamond in China, 2011-2013
 - Diamond Import Volume and Value in China, 2005-2013
 - Import Value Structure (by Country) of Diamond in China, 2013
 - China's Pearl Output, 2005-2013
 - Transaction Volume of the Latest Sessions of the Union of Myanmar, Jewelry Fair
 - China's Silver Output, 2003-2013
 - Silver Spot Closing Price in China, 2012-2014
 - Demand of China Jewelry for Silver, 2003-2013
 - Major Silver Jewelry Brands in China
 - Jade Jewelry Sales in Yunnan, 2008-2013
 - Proportion of Self-operated Stores of Major Jewelers in China, 2013
 - Comparison of Major Jewelry Retailers in China by Store Network
 - Share of Jewelry Sales Channels in China, 2013
 - Revenue and Net Income of Chow Tai Fook, FY2009-FY2014

- Operating Revenue Structure of Chow Tai Fook (by Product), H1 FY2013-H1 FY2014
- Operating Revenue Structure of Chow Tai Fook (by Region), H1FY2013-H1FY2014
- Gross Margin of Chow Tai Fook, FY2009-FY2014
- Operating Revenue Structure of Chow Tai Fook (by Sale Mode), H1 FY2014
- Retail Network of Chow Tai Fook, 2013
- Outlet Distribution of Chow Tai Fook, 2013
- Revenue and Net Income of Chow Sang Sang, 2008-2013
- Operating Revenue of Chow Sang Sang (by Business), 2008-2013
- Operating Revenue of Chow Sang Sang (by Region), 2008-2013
- Gross Margin & Net Profit Margin of Chow Sang Sang, 2008-2013
- Number of Jewelry Retail Outlets of Chow Sang Sang (by Region), 2007-2013
- Revenue and Net Income of Luk Fook, FY2008-FY2014
- Operating Revenue and Percentage of Luk Fook (by Business), 1HFY
- Operating Revenue Structure of Luk Fook (by Product), H1 FY2013-H1 FY2014
- Operating Revenue of Luk Fook (by Region), FY2009-FY2014
- Gross Margin of Luk Fook, FY2008-FY2014
- Number of Stores of Luk Fook (by Region), FY2010-FY2014
- Number of Stores of Luk Fook (by Region), H1 FY2014
- Number of Stores of Luk Fook in Mainland China, 2013
- Revenue and Net Income of Tse Sui Luen, FY2008-FY2014
- Gross Margin of Tse Sui Luen, FY2008-FY2014
- Revenue and Net Income of Emperor Watch & Jewelry, 2008-2013
- Revenue Breakdown and Percentage of Emperor Watch & Jewelry (by Product), 2008-2013
- Revenue of Emperor Watch & Jewelry (by Region), 2008-2013
- Integrated Gross Margin of Emperor Watch & Jewelry, 2008-2013

- Number of Stores of Emperor Watch & Jewelry, 2009-2013
- Brand Value of Lao Feng Xiang, 2006-2013
- Revenue and Net Income of Lao Feng Xiang, 2008-2013
- Sales Amount of Four New Product Series (Jade, Pearl, Jade and Colored Gemstones) of Lao Feng Xiang, 2007-2015E
- Operating Revenue and Percentage of Lao Feng Xiang (by Product), 2011-2013
- Operating Revenue and Percentage of Lao Feng Xiang (by Region), 2011-2013
- Gross Margin of Lao Feng Xiang (by Product), 2009-2013
- Sales Mode of Lao Feng Xiang, 2013
- Revenue and Net Income of Shanghai Yuyuan Tourist Mart, 2007-2013
- Operating Revenue and Percentage of Shanghai Yuyuan Tourist Mart (by Product), 2011-2013
- Operating Revenue of Shanghai Yuyuan Tourist Mart (by Region), 2011-2013
- Integrated Gross Margin of Shanghai Yuyuan Tourist Mart, 2007-2013
- Gross Margin of Shanghai Yuyuan Tourist Mart (by Business), 2011-2013
- Revenue and Net Income of Zhejiang Ming Jewelry, 2008-2013
- Output of Zhejiang Ming Jewelry (by Product), 2012-2013
- Zhejiang Ming Jewelry's Platinum Jewelry in the Total Platinum Trading Volume at Gold Exchange, 2008-2013
- Operating Revenue and Percentage of Zhejiang Ming Jewelry (by Product), 2011-2013
- Operating Revenue Structure of Zhejiang Ming Jewelry (by Region), 2013
- Operating Revenue Structure of Zhejiang Ming Jewelry (by Channel), 2013
- Integrated Gross Margin of Zhejiang Ming Jewelry, 2008-2013
- Gross Margin of Zhejiang Ming Jewelry (by Product), 2011-2013
- Sales Structure of Zhejiang Ming Jewelry by Region
- Number of Stores of Zhejiang Ming Jewelry, 2008-2013
- Revenue and Net Income of Eastern Gold Jade, 2009-2013
- Operating Revenue and Percentage of Eastern Gold Jade (by Product), 2011-2013

- Operating Revenue Structure of Eastern Gold Jade (by Region), 2013
- Integrated Gross Margin of Eastern Gold Jade, 2009-2013
- Gross Margin of Eastern Gold Jade (by Product), 2011-2013
- Development Course of Goldleaf Jewelry
- Revenue and Net Income of Goldleaf Jewelry, 2009-2013
- Operating Revenue and Percentage of Goldleaf Jewelry (by Product), 2011-2013
- Operating Revenue Structure of Goldleaf Jewelry (by Region), 2013
- Gross Margin of Goldleaf Jewelry (by Product), 2011-2013
- Number of Stores of Goldleaf Jewelry (by Type), 2011-2013
- Revenue and Net Income of Guangdong CHJ Industry, 2008-2013
- Jewelry Output and Sales Volume of Guangdong CHJ Industry, 2011-2013
- Operating Revenue and Percentage of Guangdong CHJ Industry (by Product), 2011-2013
- Operating Revenue and Percentage of Guangdong CHJ Industry (by Region), 2011-2013
- Integrated Gross Margin of Guangdong CHJ Industry, 2008-2013
- Gross Margin of Guangdong CHJ Industry (by Product), 2011-2013
- Revenue and Gross Margin of Guangdong CHJ Industry (by Channel), 2011-2013
- Number of Stores of Guangdong CHJ Industry, 2008-2013
- Major Business Process of Tesiro Jewelry
- Revenue and Net Income of Tesiro Jewelry, 2011-2013
- Operating Revenue and Percentage of Tesiro Jewelry (by Product), 2011-2013
- Operating Revenue and Percentage of Tesiro Jewelry (by Region), 2011-2013
- Gross Margin and Net Profit Margin of Tesiro Jewelry, 2011-2013
- Operating Revenue and Percentage of Tesiro Jewelry (by Sales Mode), 2011-2013
- Store Distribution of Tesiro Jewelry, 2013
- Growth Rate of Jewelry Sales in China, 2008-2016E

- 
- Export Structure of Jewelry in China, 2013
 - Market Share of Major Jewelry Enterprises in China, 2013
 - Gross Margin of Major Jewelry Enterprises in China, 2009-2013

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,400 USD
- Hard copy 2,600 USD
- PDF (Enterprisewide license)..... 3,800 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: