



**Global and China Jewelry Industry Report,  
2014-2018**

**Aug.2015**

## 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

Jewelry belongs to the luxury goods, and the industry development is mainly affected by per capita income growth. In 2014, the global jewelry sales reported USD157 billion, of which, China (Mainland and Hong Kong) contributed retail sales of USD80.7 billion (according to the exchange rate of 1:6.3997), sweeping a global share of 51.4%.

Gold jewelry accounts for the largest amount of jewelry consumption in Mainland China, more than 50%. In 2013, the slump in gold price provoked consumers' lust for purchase, which made the gold jewelry consumption jump by 42.5% that very year, to 716.5 tons. In 2014, as gold prices were moderating, the gold rush retreated, resulting in a year-on-year decline of 6.9% in gold jewelry consumption, to 667.1 tons.

Jewelry gets distributed mainly via stores and the Internet. In recent years, along with the development of the Internet, the Chinese jewelry enterprises have entered the era of internet marketing. The proportion of E-commerce sales has increased from less than 0.5% in 2009 to 4.0% in 2014. O2O mode is the current focus: offline jewelry giants develop online marketing channels, while online Internet jewelry brands gradually turn their attention to offline marketing channels.

At present, the jewelry market in China is dominated by Chow Tai Fook, Chow Sang Sang, Lao Feng Xiang, Lukfook, etc. In 2014, Chow Tai Fook secured first place with 9.5% market share, followed by Lao Feng Xiang with 5.4%. However, some Hong Kong brands give priority to Hong Kong, Macao and Taiwan, in contrast to a relatively market share in the Mainland, e.g. Lukfook, which in 2014 represented 3.1% market share in China yet merely 0.7% in the Mainland. In addition, in order to further improve the market share, companies are still actively expanding the marketing network.

**Chow Tai Fook** acquired 100% equities of Hearts On Fire (engaged in diamond jewelry) in August 2014, which made up for the disadvantages of no unique features nor high-end products in diamond accessories, but also extended the marketing network in the United States, Australia, Europe, Japan and other countries.

**Lao Feng Xiang** opened its first overseas store in Sydney in 2012; later in 2013, the Hong Kong branch went into operation; in 2014 and 2015, the Fifth Avenue's flagship store in New York City and Tsim Sha Tsui store in Hong Kong were officially unveiled, respectively. Currently, Lao Feng Xiang is preparing for construction of Canadian division and Vancouver jewelry shop.

To further develop the Internet marketing channel, **Ming Jewelry** was stationed in Jingdong Mall in September 2014. In 2015, it will put effort into creating the newly purchased Shenzhen Zhuoyi Jewelry into an innovative brand for the young.

This report highlights the following:

- Global jewelry consumption, raw material markets, brand enterprises, etc.;
- Development, sales mode, regional market pattern, trends, etc. of China jewelry industry;
- Production and processing, supply and demand, import and export, competition pattern, etc. of China jewelry industry;
- Supply and demand of gold jewelry, platinum jewelry, diamond jewelry, etc. in China;
- Operation, revenue structure, gross margin, sales network, etc. of 5 players in Hong Kong and 9 players in the Mainland.

Players	Headquarters	Number of outlets in Mainland China	Marketing layout
	Shanghai	2,736	Regional layout: the Yangtze River Delta <b>45%</b> , most stores outside Shanghai are placed in third and fourth-tier cities, expanding foreign markets since 2012 ;
	Shanghai	1,809	Mainly in Shanghai, gradually expanding to the central and western regions ;
	Guangdong	1,501	Converged in East China and South China, gradually expanding to the central and western regions ;
	Hong Kong	1,319	National layout: first-tier cities <b>17.6%</b> , second-tier cities <b>33.5%</b> , third-tier and other cities <b>48.9%</b> ;
	Hong Kong	1,214	National layout: first-tier cities <b>12.0%</b> , second-tier cities <b>55.4%</b> , third-tier and other cities <b>32.6%</b> ; Operating <b>30</b> e-commerce platforms ;
<b>MINGR</b>	Zhejiang	1,099	Regional layout: <b>50%</b> in Jiangsu and Zhejiang, <b>20%</b> in Beijing and Tianjin ;
	Guangdong	685	Regional layout: over <b>50%</b> in the East, about <b>20%</b> in the North and <b>8%</b> in the South ;
<b>Chow Sang Sang</b>	Hong Kong	322	Converged in coastal region, gradually expanding to the central and western regions, focus on first and second-tier cities ;
	Hong Kong	54	Converged in first and second-tier cities ;

Source: Global and China Jewelry Industry Report, 2014-2018 ; ResearchInChina

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