

China Gold & Silver Jewelry Market Channel Report, 2007-2008

<https://marketpublishers.com/r/C16B8139D25EN.html>

Date: May 2008

Pages: 61

Price: US\$ 1,600.00 (Single User License)

ID: C16B8139D25EN

Abstracts

The growth of China jewelry industry is exceedingly faster than expected. Starting from 2005, the sales of China's jewelry industry has increased by about CNY20 billion annually and it reached CNY180 billion in 2007.

So far, China's jewelry industry has become the third largest consumer hot spot preceded only by real estate and automobile industry. In March 2008, the latest statistics showed that the sales of gold and silver jewelry have kept a good momentum and its sales growth has topped among various kinds of commodities for five consecutive months.

Since 2003, the retail price index of China's gold and silver jewelry goods has risen continuously (on the basis of 100 in the previous year) and has been all higher than commodity retail price index in the same period, indicating that the growth rate of retail price of gold and silver jewelry goods has been higher than other commodities.

In 2007, the value of import and export of China's jewelry products totaled US\$14.2 billion, of which, US\$6.2 billion were from the imports and US\$8 billion were from the exports, up 35.57% on year and 16.81% on year respectively. That indicates China's jewelry market is increasingly prosperous and the import and export trade is continuously growing. China's position as one of world's main jewelry manufacturers and consumers has been further strengthened.

By the end of 2007, there have been more than 10,000 jewelry sales enterprises in Mainland. Most of them are small outlets without independent brands and competitiveness. However, some of them with large-scale shops or chain stores have independent brands, but their brands are only regional ones, which lack trans-regional

influence. For example, Lao Fengxiang Co., Ltd., as a local leading brand in Shanghai, achieved around CNY6.1 billion in the sales revenue in 2007, still amounting to only less than 4% of China's total market share.

The report is based on the authoritative statistics of the Gems & Jewelry Trade Association of China, the China Gold Association, the Shanghai Diamond Exchange, the Ministry of Commerce, the National Bureaus of Statistics and statistics bureaus at provincial or municipal level, as well as information from financial statements of some key jewelry enterprises.

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