

China Jewelry Industry Report, 2013-2016

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Abstracts

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.

Contents

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

Selected Charts

SELECTED CHARTS

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

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