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China Luxury Apparel and Accessories Market Report, 2012-2015

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Abstracts

In 2012, the global luxury market valued EUR212 billion, representing a year-on-year increase of 10%. Chinese consumers became the world's largest consumer group of luxury goods and they spent RMB306 billion in the world, most of which was done in Hong Kong, Macao and other countries / regions, while only 39.28% in Mainland China.

In 2012, as China's economic growth slowed down as well as the government cut expenses on dining, cars, wine and other aspects, the Chinese mainland luxury consumption cooled down substantially, and the growth rate of the total consumption of luxury goods dropped from 30% in 2011 to 7.2% in 2012.

However, Chinese luxury consumers have changed their attitude from showing off to enjoying and rational consumption with more mature consumption concept, so Chinese luxury market will still witness steady growth in the future.

Affected by the slowdown in growth rate of Chinese mainland luxury market in 2012, major global luxury brands have adjusted their strategic layout in China in 2013, and most of them would rather enhance the performance of the existing stores than open new stores in second- and third-tier cities. Global and China Luxury Apparel Market Report, 2012-2015 mainly studies the global and Chinese luxury market size, geographical distribution, tariff policies, Chinese luxury consumers and the development of Chinese luxury E-commerce; meanwhile, it analyzes the operation of 16 major luxury brands under eight large global groups as well as their development in China.

LVMH Group acts as the world's largest luxury group that owns more than 50 luxury brands, and it still has been been exploring more brands through acquisition. As of the end of 2012, LVMH Group had set up 3,204 shops around the globe, including 670

ones in the Asia-Pacific region excluding Japan. Impacted by Chinese luxury market, LVMH Group claims that it will not expand in China in 2013 in order to maintain its high-end image, and will also cease the establishment of stores in second- and third-tier cities of China. As a member of LVMH Group, Louis Vuitton had opened a total of 45 stores in China by the end of June, 2013. In H1 2013, LV built a new store in Shanghai and Wuhan each.

61% of the revenue of Kering Group (formerly known as PPR) stemmed from the luxury business in 2012, in which GUCCI was the biggest contributor that had possessed 60 stores in Mainland China (including Sanya Gucci Duty Free Store) by the end of June 2013. By geographical distribution, many Gucci stores are located in second-tier cities such as Shijiazhuang, Taiyuan and Zhengzhou, aside from first-tier cities Beijing and Shanghai.

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