

Global and China Jewelry Industry Report, 2014-2018

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Abstracts

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.

Contents

1 OVERVIEW OF JEWELRY

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

2 DEVELOPMENT OF GLOBAL JEWELRY MARKET

- 2.1 Market Overview
- 2.2 Main Raw Material Markets
 - 2.2.1 Gold
 - 2.2.2 Silver
 - 2.2.3 Platinum
- 2.3 Main Brands
 - 2.3.1 Tiffany
 - 2.3.2 Cartier
 - 2.3.3 Bvlgari

3 DEVELOPMENT 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 Trends
 - 3.4.1 Materials
 - 3.4.2 Consumption

4 CHINA JEWELRY MARKET

- 4.1 Production and Processing
 - 4.1.1 Purchase of Raw Materials
 - 4.1.2 Production Bases
- 4.2 Sales
 - 4.2.1 Market Size
 - 4.2.2 Consumption Structure

4.3 Import and 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 Operating Indices

5 CHINA JEWELRY MARKET SEGMENTS

5.1 Gold Jewelry

5.1.1 Output

5.1.2 Consumption

5.1.3 Market

5.1.4 Price Trend

5.2 Platinum Jewelry

5.2.1 Demand

5.2.2 Market

5.3 Diamond Jewelry

5.3.1 Supply and Demand

5.3.2 Import and Export

5.3.3 Market

5.4 Pearl Jewelry

5.4.1 Supply and Demand

5.4.2 Market

5.5 Jadeite Jewelry

5.6 Silver Jewelry

5.6.1 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 Mode

7.1.1 Overview

7.1.2 Sales Mode of Key Players

7.2 Sales Channel

7.2.1 Overview

7.2.2 Store Sales

7.2.3 Network Sales

8 KEY JEWELRY ENTERPRISES IN HONG KONG

8.1 Chow Tai Fook

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

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 Lukfook

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

8.4.1 Profile

8.4.2 Operation

8.4.3 Revenue Structure

8.4.4 Gross Margin

8.5 Emperor Watch & Jewellery

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

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 Yuyuan Tourist Mart

9.2.1 Profile

9.2.2 Operation

9.2.3 Revenue Structure

9.2.4 Gross Margin

9.2.5 Sales Network

9.3 Ming Jewelry

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

9.4.1 Profile

9.4.2 Operation

9.4.3 Revenue Structure

9.4.4 Gross Margin

9.4.5 Sales Network

9.5 Goldleaf Jewelry

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 CHJ

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

9.7 IDEAL

9.7.1 Profile

9.7.2 Operation

9.7.3 Revenue Structure

9.7.4 Production and Sales

9.7.5 Sales Network

9.8 CUIHUA

9.8.1 Profile

9.8.2 Operation

9.8.3 Revenue Structure

9.8.4 Production and Sales

9.8.5 Sales Network

9.9 TESIRO

10 SUMMARY AND FORECAST

10.1 Market

10.2 Enterprise

Selected Charts

SELECTED CHARTS

Jewelry Industry Chain

Global Jewelry Industry Sales, 2000-2015

US Jewelry Consumption Structure, 2014

UK Jewelry Consumption Structure, 2014

India Jewelry Consumption Structure, 2014

Global Gold Supply, 2003-2015

Global Gold Demand Structure (by Field), 2013-2014

Global Gold Jewelry Demand, 2003-2015

Global Gold Jewelry Demand Structure (by Region/Country), 2013-2014

Global Gold Price Trend, 2013-2014

Global Silver Supply, 2003-2014

Global Silver Minerals Output Structure (by Country), 2013-2014

Global Silver Demand Structure, 2010-2014

Global Silver Jewelry Demand, 2003-2014

Global Silver Price Trend, 2013-2015

Global Platinum Mines Supply, 2003-2014

Global Platinum Mines Supply Structure (by Region), 2013-2014

Global Platinum Demand Structure (by Sector), 2013-2014

Global Platinum Jewelry Demand, 2003-2014

Global Platinum Jewelry Demand (by Country/Region), 2003-2014

Global Platinum Price Trend, 2013-2015

Global Sales Network Distribution of Tiffany, FY2004-FY2014

Global Sales Network Distribution of LVMH, 2014

Retail Sales Growth of Commodities of Wholesale and Retail Companies above Designated Size in China, 2007-2015

China Jewelry Market Demand Structure

China GDP per capita, 2000-2014

Per Capita Disposable Income of China's Urban and Rural Residents, 2006-2016

China Wedding Consumption Structure, 2014

Number of Marriage Registers in China, 2006-2014

China Precious Metal Trading Volume and Value, 2014

China GDP Growth Rate, 2006-2015

Average Wage of Workers in China, 2002-2014

Major Jewelry Processing & Trade Bases in China

Jewelry & Jade Featured Industry Bases in China

Jewelry Sales in Mainland China, 2007-2018
Jewelry Sales and Growth Rate in Hong Kong, 2007-2018
Jewelry Consumption Structure in Mainland China, 2014
Total Export-Import Value of Jewelry in China, 2007-2015
China Jewelry Import Value, 2008-2015
China Jewelry Import Value Structure (by Country/Region), 2013-2014
China Jewelry Export Value, 2008-2015
China Jewelry Export Value Structure (by Product), 2013-2014
China Jewelry Export Value Structure (by Country/Region), 2014
China Jewelry Export Value Structure (by Province/City), 2013-2014
China Jewelry Brand Positioning
Main Jewelry Brands in China
Ranking of Jewelry Brand Value in China, 2015
Market Share of Major Jewelry Retailers in China, 2014
Market Share of Major Jewelry Retailers in Mainland China, 2014
Revenue Growth of Major Jewelry Retailers in China, 2014
Network Expansion Growth of Major Jewelry Retailers in China, 2009-2014
China Gold Supply Structure, 2014
China Mineral Gold Output and Growth Rate, 2007-2014
China Gold Consumption and Growth Rate, 2007-2014
China Gold Consumption Structure, 2013-2014
China Gold Jewelry Consumption and Growth Rate, 2007-2014
China Gold (Au9995) Spot Closing Price, 2013-2015
Gross Margin of Gold Jewelry of Major Jewelry Retailers in China, 2011-2014
China Platinum Demand and Growth Rate, 2002-2013
China Platinum Demand Structure (by Sector), 2013-2014
Global and China Platinum Jewelry Demand, 2002-2014
China Average Platinum (Pt9995) Spot Price, 2013-2015
International Diamond Price Trend, 2007-2014
China Diamond Trading Volume and Value, 2011-2014
China Diamond Import Volume and Value, 2005-2015
China Diamond Import Value Structure (by Country), 2013-2014
China Pearl Output and Growth Rate, 2005-2014
Transaction Volume of the Latest Sessions of the Union of Myanmar, Jewelry Fair
China Silver Demand and Growth Rate, 2003-2014
China Silver Spot Closing Price, 2013-2015
China Jewelry Demand for Silver, 2003-2015
Main Silver Jewelry Brands in China
China Jewelry Industry Pattern

Yunnan Jewelry Sales, 2008-2015
Proportion of Self-operated Stores of Major Jewelers in China, 2014
Store Distribution of Major Jewelry Retailers in China, 2014
China Jewelry Sales Channel Structure, 2014
Operation Mode of Chow Tai Fook
Revenue and Net Income of Chow Tai Fook, FY2009-FY2015
Global Sales Network of Hearts On Fire, FY2015
Jewelry Sales Volume and Growth Rate of Chow Tai Fook in Mainland China, FY2011-FY2015
Revenue Breakdown of Chow Tai Fook (by Product), FY2013-FY2015
Revenue Breakdown of Chow Tai Fook (by Region), FY2011-FY2015
Gross Margin of Chow Tai Fook, FY2009-FY2015
Retail Network Distribution of Chow Tai Fook as of June 2015
Jewelry Revenue Structure of Chow Tai Fook in Mainland China (by Sales Mode), FY2013-FY2015
Jewelry Revenue Structure of Chow Tai Fook in Mainland China (by Channel), FY2013-FY2015
Jewelry Retail Distribution of Chow Tai Fook in Mainland China, FY2015
Jewelry Revenue Structure of Chow Tai Fook in Mainland China (by Price), FY2015
Revenue Structure of Chow Tai Fook in Hong Kong, Macao and Other Markets (by Channel), FY2013-FY2015
Revenue of Chow Tai Fook in Hong Kong, Macao and Other Markets (by Region), FY2013-FY2015
Jewelry Revenue Structure of Chow Tai Fook in Hong Kong, Macao and Other Markets (by Price), FY2015
Revenue and Net Income of Chow Sang Sang, 2008-2014
Revenue Breakdown of Chow Sang Sang (by Business), 2008-2014
Revenue Breakdown of Chow Sang Sang (by Region), 2008-2014
Gross Margin and Net Profit Margin of Chow Sang Sang, 2008-2014
Number of Chow Sang Sang Jewelry Retail Stores (by Region), 2007-2014
Jewelry Retail Distribution of Chow Sang Sang in Mainland China
Revenue and Net Income of Lukfook, FY2008-FY2015
Operating Revenue Structure of Lukfook (by Product), FY2014-FY2015
Revenue Breakdown of Lukfook (by Region), FY2009-FY2015
Gross Margin of Lukfook, FY2008-FY2015
Revenue Structure of Lukfook (by Channel), FY2014-FY2015
Store Number of Lukfook (by Region), FY2010-FY2015
Store Number of Lukfook (by Region), FY2014-FY2015
Store Number of Lukfook in Mainland China, FY2014-FY2015

Revenue and Net Income of Tse Sui Luen, FY2008-FY2014
Revenue Structure of Tse Sui Luen (by Channel), FY2014-FY2015
Revenue Structure of Tse Sui Luen (by Region), FY2014-FY2015
Gross Margin of Tse Sui Luen, FY2008-FY2015
Revenue and Net Income of Emperor Watch & Jewellery, 2008-2014
Revenue Breakdown and Proportion of Emperor Watch & Jewellery (by Product), 2008-2014
Revenue Breakdown of Emperor Watch & Jewellery (by Region), 2008-2014
Consolidated Gross Margin of Emperor Watch & Jewellery, 2008-2014
Store Distribution of Emperor Watch & Jewellery, 2009-2014
Brand Value of Lao Feng Xiang, 2006-2015
Revenue and Net Income of Lao Feng Xiang, 2008-2015
Sales of Four New Product Series (Jade, Pearl, Jade and Colored Gemstones) of Lao Feng Xiang, 2007-2015
Operating Revenue of Lao Feng Xiang (by Product), 2011-2014
Operating Revenue of Lao Feng Xiang (by Region), 2011-2014
Gross Margin of Lao Feng Xiang (by Product), 2009-2014
Revenue and Net Income of Yuyuan Tourist Mart, 2007-2015
Revenue Breakdown of Yuyuan Tourist Mart (by Business), 2011-2014
Operating Revenue of Yuyuan Tourist Mart (by Region), 2011-2014
Consolidated Gross Margin of Yuyuan Tourist Mart, 2007-2014
Gross Margin of Yuyuan Tourist Mart (by Business), 2011-2014
Revenue and Net Income of Ming Jewelry, 2008-2015
Output and Sales Volume of Ming Jewelry (by Product), 2012-2014
Ming Jewelry's Platinum Jewelry in the Total Platinum Trading Volume at Gold Exchange, 2008-2014
Revenue Breakdown of Ming Jewelry (by Product), 2011-2014
Operating Revenue Structure of Ming Jewelry (by Region), 2014
Operating Revenue Structure of Ming Jewelry (by Channel), 2014
Consolidated Gross Margin of Ming Jewelry, 2008-2014
Gross Margin of Ming Jewelry (by Product), 2011-2014
Sales Area Structure of Ming Jewelry
Store Number of Ming Jewelry, 2008-2014
Revenue and Net Income of Eastern Gold Jade, 2009-2015
Revenue Breakdown of Eastern Gold Jade (by Product), 2011-2014
Revenue Structure of Eastern Gold Jade (by Region), 2013-2014
Consolidated Gross Margin of Eastern Gold Jade, 2009-2014
Gross Margin of Eastern Gold Jade (by Product), 2011-2014
Development History of Goldleaf Jewelry

Revenue and Net Income of Goldleaf Jewelry, 2009-2015
Revenue Breakdown of Goldleaf Jewelry (by Product), 2011-2014
Revenue Structure of Goldleaf Jewelry (by Region), 2013-2014
Gross Margin of Goldleaf Jewelry (by Product), 2011-2014
Store Number of Goldleaf Jewelry (by Category), 2011-2014
Revenue and Net Income of CHJ, 2008-2015
Jewelry Output and Sales Volume of CHJ, 2011-2014
Revenue Structure of CHJ (by Product), 2013-2014
Operating Revenue Breakdown and Proportion of CHJ (by Region), 2011-2014
Consolidated Gross Margin of CHJ, 2008-2014
Revenue and Gross Margin of CHJ (by Channel), 2011-2014
Jewelry Store Number of CHJ, 2008-2014
Revenue and Net Income of IDEAL, 2011-2015
Revenue Breakdown of IDEAL (by Product), 2011-2014
Revenue Breakdown of IDEAL (by Region), 2011-2014
Output and Sales Volume of IDEAL, 2011-2014
Revenue Breakdown and Proportion of IDEAL (by Channel), 2013-2014
Revenue and Net Income of CUIHUA, 2011-2015
Revenue Breakdown of CUIHUA (by Product), 2011-2014
Revenue Structure of CUIHUA (by Region), 2013-2014
Output and Sales Volume of CUIHUA, 2011-2014
Sales Network of CUIHUA, 2014
Revenue Breakdown of CUIHUA (by Channel), 2011-2014
Main Business Process of TESIRO
China Jewelry Sales Growth Rate, 2008-2018E
China Jewelry Import/Export Growth Rate, 2009-2015
China Jewelry Export Value Structure, 2014
Market Share of Jewelry Enterprises in China, 2014
Gross Margin of Major Jewelry Enterprises in China, 2009-2014

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