

India Gems and Jewelry Market By Type (Gold, Diamond, Silver, Gemstones, Others (Pearl, Platinum, etc.)), By Distribution Channel (Offline and Online), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

India Gems and Jewelry Market has valued at USD 80.51 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.41% through 2029. The India gems and jewelry market is a vibrant and dynamic sector that has long been at the heart of the country's rich cultural heritage and economic activity. India is one of the world's largest consumers and exporters of gems and jewelry, and the industry holds significant economic, cultural, and historical importance.

The gems and jewelry industry in India has a storied history that dates back thousands of years. India was renowned as the 'Land of Gold' in ancient times, and its jewelry-making traditions have been passed down through generations. From intricate temple jewelry to traditional Kundan and Polki styles, India's jewelry craftsmanship is celebrated for its artistry and attention to detail.

Jewelry holds immense cultural and social importance in India. It is an integral part of traditions, rituals, and celebrations. For example, gold jewelry is often gifted during weddings, marking both financial security and emotional bonds. In festivals and ceremonies, jewelry plays a vital role, symbolizing prosperity and good luck. Different regions of India have their distinct jewelry styles, reflecting the country's diverse culture.

India has also established itself as a global hub for gemstone processing and trading. The city of Jaipur, often referred to as the 'Pink City,' is particularly famous for its gemstone cutting and polishing industry. It handles an extensive range of gemstones,

from emeralds to sapphires and more, making India a prominent player in the global gemstone market.

The India gems and jewelry market offers a wide array of products, including gold, silver, diamond, and platinum jewelry. Traditional jewelry like Kundan, Meenakari, and Jadau coexists with contemporary designs, catering to a broad spectrum of consumers.

The gems and jewelry industry is a significant contributor to India's economy. It provides employment to a vast workforce, particularly in rural and semi-urban areas. India is a major exporter of gems and jewelry, with exports accounting for a substantial portion of the country's foreign exchange earnings.

While the India gems and jewelry market is thriving, it also faces several challenges. These include fluctuating gold prices, concerns regarding the authenticity of gemstones, and evolving consumer preferences, particularly among the younger generation.

However, these challenges also present opportunities for innovation and adaptation. Brands are investing in online platforms, enabling consumers to explore and purchase jewelry from the comfort of their homes. The market is also witnessing a trend toward lightweight and wearable jewelry, reflecting the changing lifestyles and preferences of consumers.

The Indian government has introduced several initiatives to boost the gems and jewelry sector, including the establishment of specialized jewelry parks and gemstone institutes to enhance skills and knowledge in the industry. Additionally, the introduction of the Goods and Services Tax (GST) has brought transparency and ease of compliance to the market.

In conclusion, the India gems and jewelry market is a multifaceted industry that marries a rich cultural heritage with modern economic activity. Its historical legacy, cultural significance, diverse product range, and contribution to the economy make it an integral part of India's identity. The industry's ability to adapt to changing consumer preferences and navigate global trends will determine its continued growth and success in the years to come.

Key Market Drivers

Cultural Significance and Tradition

The most profound driver behind the Indian Gems and Jewelry Market is its deep-rooted cultural significance and tradition. Jewelry has been an integral part of Indian culture for centuries. It holds a special place in religious ceremonies, festivals, weddings, and other auspicious occasions. Traditional Indian jewelry, such as Kundan, Polki, Jadau, and temple jewelry, is celebrated for its craftsmanship and symbolic meaning.

These cultural practices and traditions create a consistent demand for gems and jewelry. For example, gold is considered not only a symbol of wealth but also an embodiment of prosperity, making it a preferred choice for investment. On auspicious occasions and festivals like Diwali and Akshaya Tritiya, the purchase of gold jewelry is considered propitious, reinforcing the market's growth.

Moreover, India's diverse culture and traditions have resulted in a wide array of jewelry designs, catering to the preferences of various regions and communities. From intricate designs in the North to elegant and minimalist styles in the South, the Indian market is versatile and adaptive, ensuring a continuous influx of consumers.

Increasing Disposable Income and Aspirational Buying

The second significant driver is the rising disposable income and aspirational buying patterns among the Indian population. With the country's economy steadily growing, a burgeoning middle class, and increasing urbanization, more people have access to higher incomes and aspire to invest in jewelry.

Jewelry, particularly gold, has been considered a secure investment in India. As incomes rise, consumers seek to purchase jewelry not only for ornamental purposes but also as a form of wealth preservation and asset diversification. This dual function of jewelry as both an adornment and an investment has driven substantial demand, especially in the gold and diamond segments.

Aspirational buying is further encouraged by the emergence of modern retail formats, such as branded jewelry stores and online platforms, which offer a wide range of designs, transparency in pricing, and certification, making the purchase of jewelry a more straightforward and secure process.

Exports and Global Demand

India's Gems and Jewelry Market is not limited to domestic consumption; it plays a crucial role in global trade. The country is one of the world's largest exporters of gems

and jewelry, contributing significantly to foreign exchange earnings. Indian jewelry is highly regarded for its craftsmanship, intricate designs, and competitive pricing.

The export segment serves as a powerful driver of the domestic market. The international reputation of Indian jewelry increases its appeal among domestic consumers. This leads to a rise in the adoption of Western-style jewelry, with Indian brands incorporating global design trends and catering to a diverse clientele, both at home and abroad.

Furthermore, the integration of e-commerce and digital platforms has made it easier for international buyers to access Indian jewelry. With just a few clicks, consumers from around the world can explore and purchase Indian jewelry, boosting export sales and fostering a sense of global appeal.

Key Market Challenges

Regulatory Framework and Compliance

One of the foremost challenges facing the Indian Gems and Jewelry industry is the complex and evolving regulatory landscape. The sector is subject to various laws and regulations related to customs, excise, taxation, and foreign trade. The introduction of the Goods and Services Tax (GST) in 2017 significantly changed the taxation structure for the industry. Adapting to these changes and ensuring compliance has been a considerable challenge for businesses, particularly smaller and unorganized players.

Moreover, the industry is exposed to scrutiny regarding money laundering and terrorist financing due to its potential for high-value transactions. Compliance with stringent Know Your Customer (KYC) and Anti-Money Laundering (AML) regulations adds an additional layer of complexity. To navigate this, the industry requires substantial investment in technology, employee training, and compliance procedures.

Ethical and Sustainable Sourcing

The global Gems and Jewelry industry has increasingly shifted its focus towards ethical and sustainable sourcing practices. Consumers are becoming more conscious of the origin of the gemstones and precious metals used in their jewelry. Ensuring that gems and metals are sourced responsibly has emerged as a challenge for the Indian industry.

India is a significant player in the diamond processing industry, with the majority of the

world's diamonds being cut and polished in the country. The challenge here is to ensure that the diamonds are conflict-free, meaning they are not associated with human rights abuses or used to finance armed conflict. Adhering to the Kimberley Process Certification Scheme and preventing the entry of conflict diamonds into the supply chain is vital.

Similarly, the industry must address concerns related to the environmental impact of mining and the fair treatment of workers. Consumers increasingly demand traceability and certification that attests to ethical sourcing and fair labor practices, putting pressure on Indian jewelers to adopt responsible supply chain practices.

E-commerce and Technology Adoption

The advent of e-commerce and digital technologies has transformed the way consumers shop for jewelry. Indian consumers are increasingly turning to online platforms for their jewelry purchases. This shift poses challenges for traditional brick-and-mortar retailers who must adapt to the digital age to remain competitive. Online retailers must grapple with the complexities of logistics, secure payment processing, and the risk of fraudulent transactions.

Furthermore, the Gems and Jewelry market faces challenges in harnessing technology for improved efficiency and transparency within the supply chain. Blockchain technology, for instance, has been explored as a means of verifying the authenticity and provenance of gemstones and metals. However, implementing these technological solutions requires investment in infrastructure and education.

The counterfeiting of jewelry is another concern addressed by technology. To protect the reputation of 'Made in India' jewelry and guarantee quality, the industry must invest in cutting-edge anti-counterfeiting measures and quality control techniques.

Key Market Trends

Ethical Sourcing and Sustainability

One of the most prominent trends in the Indian gems and jewelry market is the growing emphasis on ethical sourcing and sustainability. Consumers are increasingly concerned about the origins of the gemstones and metals used in jewelry and the environmental and social impact of the industry. As a result, the market has seen the following developments:

Responsible Sourcing: Consumers are demanding greater transparency in the supply chain, with a focus on responsibly sourced materials. This trend has prompted jewelry manufacturers and retailers to trace the origins of their gemstones and metals, ensuring they are not associated with conflict, environmental harm, or unethical labor practices.

Lab-Grown Diamonds: The popularity of lab-grown diamonds is on the rise. These diamonds are created in a controlled environment, reducing the environmental impact and ethical concerns associated with traditional diamond mining. Consumers are attracted to the sustainability aspect and often consider lab-grown diamonds a more responsible choice.

Recycling and Upcycling: There is a growing interest in recycling and upcycling old jewelry. Consumers are looking to redesign and repurpose existing pieces, reducing the demand for newly mined materials. Jewelers are offering services to transform old jewelry into contemporary designs.

Sustainable Packaging: Jewelry brands are also focusing on sustainable packaging, reducing the use of plastics and opting for eco-friendly materials. Packaging that can be repurposed or recycled is becoming more common.

E-commerce and Digital Transformation

The Indian gems and jewelry market has witnessed a significant shift toward e-commerce and digital transformation. As consumers increasingly turn to online platforms for shopping, the market has adapted in several ways:

Online Marketplaces: Traditional jewelry businesses have expanded their online presence through e-commerce platforms. Customers can now explore a vast range of jewelry designs, compare prices, and make purchases from the comfort of their homes.

Customization: Many online jewelers offer customization options, allowing customers to design their own pieces. This trend provides a personalized shopping experience, with customers selecting the gemstone, metal, and design of their choice.

Virtual Try-Ons: Some jewelry retailers are using augmented reality (AR) technology to offer virtual try-on experiences. Customers can see how jewelry looks on them without physically trying it on, enhancing the online shopping experience.

Blockchain Technology: To address concerns about the authenticity and provenance of gemstones and jewelry, blockchain technology is being explored to create secure, tamper-proof records of a gem's journey from the mine to the consumer.

Cultural Fusion and Contemporary Designs

Indian jewelry design has traditionally been rooted in culture, with a focus on traditional motifs and techniques. However, a growing trend in the market is the fusion of traditional and contemporary elements:

Fusion Jewelry: Designers are creating pieces that combine traditional Indian craftsmanship with modern aesthetics. This fusion appeals to younger consumers looking for unique and culturally significant jewelry.

Lighter and Everyday Jewelry: While ornate and heavy jewelry remains popular for special occasions, there is a trend toward lighter and more wearable pieces for everyday use. These designs are versatile and suitable for casual wear.

Minimalism: Minimalist jewelry, characterized by simplicity and clean lines, is gaining popularity. This trend is driven by a desire for understated elegance and versatility.

Heritage Revival: Some jewelry designers are reviving traditional techniques and designs, catering to consumers who appreciate the cultural and historical significance of jewelry.

Segmental Insights

Type Insights

Gold holds an unquestionably significant share in the India gems and jewelry market. The relationship between gold and the Indian market is deeply rooted in the country's culture, traditions, and economic history. Several factors contribute to the prominence of gold within this market.

Gold has been a part of Indian culture for centuries. It is not merely considered a precious metal but is deeply intertwined with religious beliefs, cultural celebrations, and rituals. In India, gold jewelry is often worn during weddings, festivals, and other auspicious occasions as a symbol of prosperity and blessings. The cultural significance of gold ensures a steady demand for gold jewelry, and it is often the first choice for

gifting during special occasions.

Gold is traditionally regarded as a secure store of value. In India, it is seen as a form of long-term investment and a means of safeguarding wealth. During times of economic uncertainty or market volatility, many Indian families turn to gold as a way to protect their savings. Gold jewelry, coins, and bullion are considered a form of financial security, and this dual-purpose nature of gold contributes to its continued popularity.

The India gems and jewelry market offers a wide array of gold jewelry options. From intricate bridal sets to everyday wear pieces, the diversity in designs, styles, and price ranges caters to a broad spectrum of consumers. Traditional, contemporary, and fusion designs ensure that gold jewelry remains a coveted choice for various age groups and fashion preferences.

Weddings are significant life events in India, and gold jewelry is an integral part of the bridal trousseau. Families invest in gold jewelry for brides, grooms, and other family members. The demand for gold surges during the wedding season, contributing significantly to the gems and jewelry market. Beyond weddings, festivals and celebrations also see an uptick in gold jewelry purchases.

Gold plays a role in the Indian social fabric and is often gifted at various stages of life, from birth to milestones like graduations. The tradition of dowry, although legally prohibited, has also influenced the demand for gold jewelry. Societal factors continue to be an undercurrent in gold's prominence in the market.

The Indian government has introduced various schemes and policies to encourage the formalization of the gold market and reduce the reliance on imports. Initiatives like the Gold Monetization Scheme and the Sovereign Gold Bond Scheme aim to mobilize the country's gold holdings and promote financial inclusion.

Distribution Channel Insights

The online presence in the India gems and jewelry market has grown significantly in recent years, reshaping the way consumers buy and engage with this traditional industry. India has a deep-rooted affinity for jewelry, with a rich history of craftsmanship and cultural significance attached to these precious adornments. The emergence of online platforms has not only modernized the sector but has also expanded its reach to a broader and more diverse consumer base.

E-commerce has revolutionized the gems and jewelry sector in India. Traditional jewelry purchases were largely confined to physical brick-and-mortar stores, often necessitating visits to multiple shops in search of the perfect piece. Online platforms have overcome geographical limitations, enabling consumers from all corners of the country to explore a vast array of jewelry collections and make informed choices from the comfort of their homes.

One of the primary reasons for the significant online presence in the India gems and jewelry market is the convenience it offers. Consumers can browse through a diverse range of jewelry, from intricate gold necklaces to dazzling diamond earrings, with a few clicks. This convenience is particularly valuable for working professionals, time-pressed individuals, and those who reside in areas with limited access to physical jewelry stores.

Online platforms also provide a vast variety of designs, catering to different tastes and budgets. Buyers can explore contemporary, traditional, and fusion jewelry, select from different metals, gemstones, and styles, and even customize pieces to their preferences.

Online jewelry retailers have invested in educating consumers, offering information about product specifications, quality certifications, and detailed descriptions. This transparency helps buyers make well-informed decisions, especially when purchasing valuable items like jewelry. With access to certifications and detailed product information, consumers can confidently choose pieces that meet their quality and authenticity expectations.

Online platforms have introduced price transparency and competition to the gems and jewelry market. Customers can easily compare prices and offerings from multiple sellers, encouraging competitive pricing and promotions. This transparency benefits consumers by allowing them to find the best deals without having to physically visit numerous stores.

Reputed online jewelry sellers in India understand the significance of trust and assurance in the purchase of jewelry. They offer certificates of authenticity, hallmarking, and quality assurance, giving customers peace of mind that they are buying genuine and high-quality products. This commitment to quality and trust has driven more consumers to consider online options.

The online space has provided a platform for emerging and artisanal jewelry designers and brands. This is especially appealing to consumers seeking unique and handcrafted

pieces. Online marketplaces have enabled these smaller, innovative brands to gain visibility and reach a broader audience, thereby diversifying the offerings in the market.

Regional Insights

The southern region of India has carved out a substantial and influential share in the India Gems and Jewelry Market. This share can be attributed to a rich blend of historical legacy, skilled craftsmanship, cultural significance, and a thriving jewelry industry.

South India has a long and illustrious history of gemstone and jewelry trade. Centuries-old traditions of jewelry craftsmanship have been passed down through generations. The region was home to numerous ancient empires and dynasties, each contributing to the development of intricate jewelry designs. This legacy has played a crucial role in establishing the South as a hub for the gem and jewelry industry.

The South is renowned for its skilled artisans who excel in the intricate art of jewelry-making. They possess the expertise to create exquisite pieces that range from intricately designed gold necklaces to fine diamond-studded jewelry. The craftsmanship is often characterized by attention to detail, precision, and a deep understanding of gemstone setting, making jewelry from the South highly sought after.

Jewelry holds profound cultural significance in South India. It is not just an accessory but an integral part of religious and traditional customs. Jewelry plays a vital role in weddings, festivals, and special occasions. This cultural attachment to jewelry has led to a consistent demand for both traditional and contemporary designs, further establishing the South's significance in the Indian jewelry market.

The southern states of India, particularly Tamil Nadu and Kerala, have earned a reputation as centers for gold and precious gemstone trade. They serve as hubs for sourcing raw materials and gemstones. South India is known for its thriving gold markets, attracting both domestic and international customers.

The southern region offers a diverse range of jewelry styles and designs, catering to the preferences of different communities and customers. From the ornate and traditional Temple Jewelry to elegant diamond and contemporary designs, South India's jewelry offerings are as varied as its cultural landscape.

Handcrafted jewelry, which often features intricate and traditional motifs, is a hallmark of the South's jewelry industry. The attention to detail in each piece of jewelry sets it apart

and appeals to those who appreciate fine craftsmanship.

South India has a strong retail presence, both in local markets and through e-commerce platforms, making its jewelry products accessible to a wide customer base. Moreover, South Indian jewelry has a significant presence in the global market, with many designs being exported to various countries, especially those with Indian diaspora.

The South's jewelry industry is renowned for its quality and trustworthiness. Customers have faith in the purity of gold, the authenticity of gemstones, and the craftsmanship of jewelry from this region.

Key Market Players

Rajesh Exports Limited

Malabar Gold Private Limited

Titan Company Limited

Bhima Jewellery and Diamonds Private Limited

Kalyan Jewellers India Limited

PC Jeweller Limited

Tribhovandas Bhimji Zaveri Limited

Joyalukkas India Limited

Hari Krishna Exports Private Limited

Vaibhav Global Limited

Report Scope:

In this report, the India Gems and Jewelry market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Gems and Jewelry Market, By Type:

Gold

Diamond

Silver

Gemstones

Others

India Gems and Jewelry Market, By Distribution Channel:

Offline

Online

India Gems and Jewelry Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India gems and jewelry market.

Available Customizations:

India Gems and Jewelry Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

India Gems and Jewelry Market By Type (Gold, Diamond, Silver, Gemstones, Others (Pearl, Platinum, etc.)), By D...

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Purchase Decision
- 4.2. Challenges Faced Post Purchase
- 4.3. Brand Awareness

5. INDIA GEMS AND JEWELRY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type Market Share Analysis (Gold, Diamond, Silver, Gemstones, Others

(Pearl, Platinum, etc.))

5.2.2. By Distribution Channel Market Share Analysis (Offline and Online)

5.2.3. By Regional Market Share Analysis

5.2.3.1. North Market Share Analysis

5.2.3.2. South Market Share Analysis

5.2.3.3. East Market Share Analysis

5.2.3.4. West Market Share Analysis

5.2.4. By Top 5 Companies Market Share Analysis, Others (2023)

5.3. India Gems and Jewelry Market Mapping & Opportunity Assessment

5.3.1. By Type Market Mapping & Opportunity Assessment

5.3.2. By Distribution Channel Market Mapping & Opportunity Assessment

5.3.3. By Regional Market Mapping & Opportunity Assessment

6. INDIA GOLD MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Distribution Channel Market Share Analysis

6.2.2. By Region Market Share Analysis

7. INDIA DIAMOND MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Distribution Channel Market Share Analysis

7.2.2. By Region Market Share Analysis

8. INDIA SILVER MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Distribution Channel Market Share Analysis

8.2.2. By Region Market Share Analysis

9. INDIA GEMSTONES MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Distribution Channel Market Share Analysis

9.2.2. By Region Market Share Analysis

10. MARKET DYNAMICS

10.1. Drivers

10.2. Challenges

11. IMPACT OF COVID-19 ON INDIA GEMS AND JEWELRY MARKET

11.1. Impact Assessment Model

11.1.1. Key Segments Impacted

11.1.2. Key Regions Impacted

12. MARKET TRENDS & DEVELOPMENTS

13. PORTER'S FIVE FORCES MODEL

13.1. Competitive Rivalry

13.2. Bargaining Power of Buyers

13.3. Bargaining Power of Suppliers

13.4. Threat of New Entrants

13.5. Threat of Substitutes

14. SWOT ANALYSIS

14.1. Strengths

14.2. Weaknesses

14.3. Opportunities

14.4. Threats

15. POLICY AND REGULATORY LANDSCAPE

16. INDIA ECONOMIC PROFILE

17. COMPETITIVE LANDSCAPE

17.1. Company Profiles

17.1.1. Rajesh Exports Limited

17.1.1.1. Company Details

17.1.1.2. Product & Services

17.1.1.3. Financials (As Per Availability)

17.1.1.4. Key market Focus & Geographical Presence

17.1.1.5. Recent Developments

17.1.1.6. Key Management Personnel

17.1.2. Malabar Gold Private Limited

17.1.2.1. Company Details

17.1.2.2. Product & Services

17.1.2.3. Financials (As Per Availability)

17.1.2.4. Key market Focus & Geographical Presence

17.1.2.5. Recent Developments

17.1.2.6. Key Management Personnel

17.1.3. Titan Company Limited

17.1.3.1. Company Details

17.1.3.2. Product & Services

17.1.3.3. Financials (As Per Availability)

17.1.3.4. Key market Focus & Geographical Presence

17.1.3.5. Recent Developments

17.1.3.6. Key Management Personnel

17.1.4. Bhima Jewellery and Diamonds Private Limited

17.1.4.1. Company Details

17.1.4.2. Product & Services

17.1.4.3. Financials (As Per Availability)

17.1.4.4. Key market Focus & Geographical Presence

17.1.4.5. Recent Developments

17.1.4.6. Key Management Personnel

17.1.5. Kalyan Jewellers India Limited

17.1.5.1. Company Details

17.1.5.2. Product & Services

17.1.5.3. Financials (As Per Availability)

17.1.5.4. Key market Focus & Geographical Presence

17.1.5.5. Recent Developments

17.1.5.6. Key Management Personnel

17.1.6. PC Jeweller Limited

17.1.6.1. Company Details

- 17.1.6.2. Product & Services
- 17.1.6.3. Financials (As Per Availability)
- 17.1.6.4. Key market Focus & Geographical Presence
- 17.1.6.5. Recent Developments
- 17.1.6.6. Key Management Personnel
- 17.1.7. Tribhovandas Bhimji Zaveri Limited
 - 17.1.7.1. Company Details
 - 17.1.7.2. Product & Services
 - 17.1.7.3. Financials (As Per Availability)
 - 17.1.7.4. Key market Focus & Geographical Presence
 - 17.1.7.5. Recent Developments
 - 17.1.7.6. Key Management Personnel
- 17.1.8. Joyalukkas India Limited
 - 17.1.8.1. Company Details
 - 17.1.8.2. Product & Services
 - 17.1.8.3. Financials (As Per Availability)
 - 17.1.8.4. Key market Focus & Geographical Presence
 - 17.1.8.5. Recent Developments
 - 17.1.8.6. Key Management Personnel
- 17.1.9. Hari Krishna Exports Private Limited
 - 17.1.9.1. Company Details
 - 17.1.9.2. Product & Services
 - 17.1.9.3. Financials (As Per Availability)
 - 17.1.9.4. Key market Focus & Geographical Presence
 - 17.1.9.5. Recent Developments
 - 17.1.9.6. Key Management Personnel
- 17.1.10. Vaibhav Global Limited
 - 17.1.10.1. Company Details
 - 17.1.10.2. Product & Services
 - 17.1.10.3. Financials (As Per Availability)
 - 17.1.10.4. Key market Focus & Geographical Presence
 - 17.1.10.5. Recent Developments
 - 17.1.10.6. Key Management Personnel

18. STRATEGIC RECOMMENDATIONS

- 18.1. Key Focus Areas
- 18.2. Target Type
- 18.3. Target Distribution Channel

19. ABOUT US & DISCLAIMER

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