

Global Gem & Jewelry Market Report - 2010 Edition

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Abstracts

There has been volatility in raw material prices; the global slowdown led to low capacity utilization in the industry bringing down the margins in the jewelry manufacturing. In some countries including India, some of the processing units have been partially shut down due to slackening demand. As a result, the value chain in the gems and jewelry industry may witness consolidation; only some major players are likely to cope with the trends and sustain the competitive pressure. It is expected that the hike in gold and silver prices might change the consumer preferences, as also impact their demand pattern. The growing consumer sophistication, decline in investment-driven jewelry demand, and competition from other luxury goods are also likely to impact the demand pattern of gems and jewelry.

Some of the recent trends in the global gems and jewelry industry include: increasing HNWI wealth, value chain integration, men's luxury jewelry, conflict diamonds, competition and buying patterns, women and self purchasers influencing jewelry market, expansion into emerging markets and branded jewelry.

The industry has been seeking further growth through processing of larger size stones and manufacture of diamond jewelry. Both the government and the gems and jewelry industry have recognized the use of IT in diamond clusters in order to enable seamless flow of information between the functional areas, right from job contractors to small/mid-sized firms, to large, integrated units. The IT interface would also provide the necessary platform for firms to scale up their operations. While several such measures have been taken, at firm-level, industry level, and government level, there exists still a need to strengthen the position of the countries in the global market place through a concerted strategy, addressing the challenges of raw-material sourcing, technological infusion at processing stage, adoption of dynamism in design and product development and sustainable market entry approach.

The report analyzes the trends, challenges and strategies of the gem and jewelry and also outlines the opportunities driving the present as well as future industry growth. The report focuses on the retail jewelry sales, trends, jewelry segments, future potential of the three large consumers of jewelry – the US, China and India. It also discusses the sales, demand, outlook of the three major segments of the jewelry industry, i.e. platinum, gold and diamond. Further, the report analyzes the major gems and jewelry companies (retail) – Gitanjali Gems Limited, Signet Jewelers Limited and Tsutsumi.

By combining SPSS Inc.'s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that impact this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables and tests.

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