

2013Q2 Jewelry

Industry Analysis Report

2013.10



Made-in-China.com



Produced by IAR Team
Focus Technology Co., Ltd.

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Note:

HS Code	Product Name
71	Pearls, stones, prec. Metals, imitation jewelry, coins, hereinafter referred to as "Jewelry"

1. China Jewelry (HS: 71) Main Original Places of Exported Goods from Jan. to June in 2013

Regions	Volume (kg)	Value (USD)	Compared to the Same Period of Last Year	
			Volume	Value
Guangdong	1,300,536,235	25,374,822,685	-16.8%	28.3%
Shandong	100,277,666	933,591,357	29.5%	60%
Fujian	372,124,717	723,368,307	8.2%	2158.7%
Shanghai	129,940,588	483,158,605	-46.6%	23.2%
Hunan	596,848,031	408,669,316	53.4%	72.1%

The total export volume of Guangdong jewelry accounted for 33.18% of China's total export Volume and the export value accounted for 87.99% of China's total export value from Jan. to June in 2013. It is noteworthy that the export volume of Fujian increased only by 8.2% year on year, while the export value increased highly by 2158.7% year on year, product prices of which rose significantly.

Source: Customs Information Network

2. China Jewelry (HS: 71) Export Trend Analysis from Jan. to June in 2013

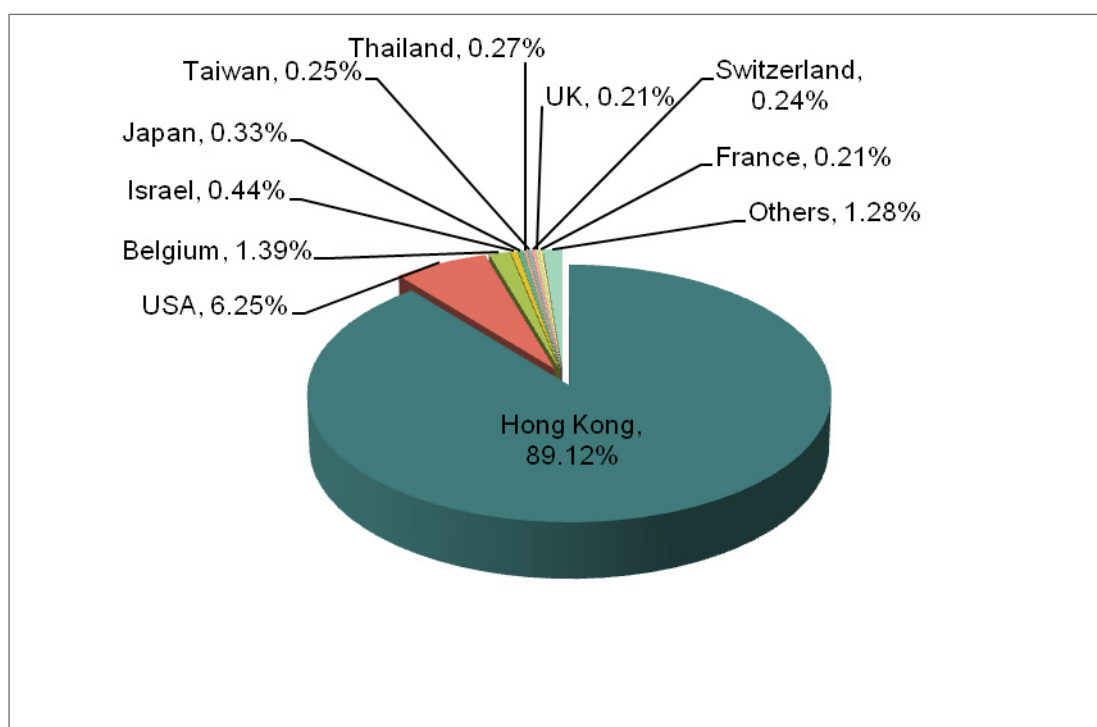
2.1. China Jewelry (HS: 71) Export Volume and Value from Jan. to June in 2013

Month	Volume (kg)	Value (USD)	Compared to the Same Period of Last Year	
			Volume	Value
January	606,737,934	4,608,340,457	49%	250.7%
February	376,128,699	3,444,260,823	12.6%	64.9%
March	756,179,631	9,050,634,222	1.4%	103.3%
April	752,815,994	5,652,342,628	0.5%	21.8%
May	923,349,002	3,451,787,455	-8.6%	-32.8%
June	504,553,448	2,629,848,399	-27.3%	-36.9%
Jan.-June Total	3,919,764,708	28,837,213,984	-0.5%	32.3%

The export value of China jewelry amounted to 28.837 billion US dollars, with an increase of 32.3% from Jan. to June in 2013.

2.2. China Jewelry (HS: 71) Export Countries/Regions Distribution from Jan. to June in 2013

No.	Countries	Volume (kg)	Value (USD)	Compared to the Same Period of Last Year	
				Volume	Value
1	Hong Kong	1,744,130,205	25,700,424,438	-7.5%	31.2%
2	USA	785,610,542	1,803,156,450	-1.3%	86.2%
3	Belgium	122,275,692	401,009,879	-18.9%	-15.1%
4	Israel	11,959,339	125,870,271	27.5%	-12.9%
5	Japan	182,337,381	95,874,316	235.5%	75.1%
6	Thailand	139,655,489	78,573,457	94.2%	34.2%
7	Taiwan	73,162,120	72,494,202	-66.3%	-4.3%
8	Switzerland	29,512,321	68,857,477	14.2%	-4.9%
9	UK	41,388,088	61,461,443	-5.3%	45.3%
10	France	23,021,279	60,225,061	118.6%	98%

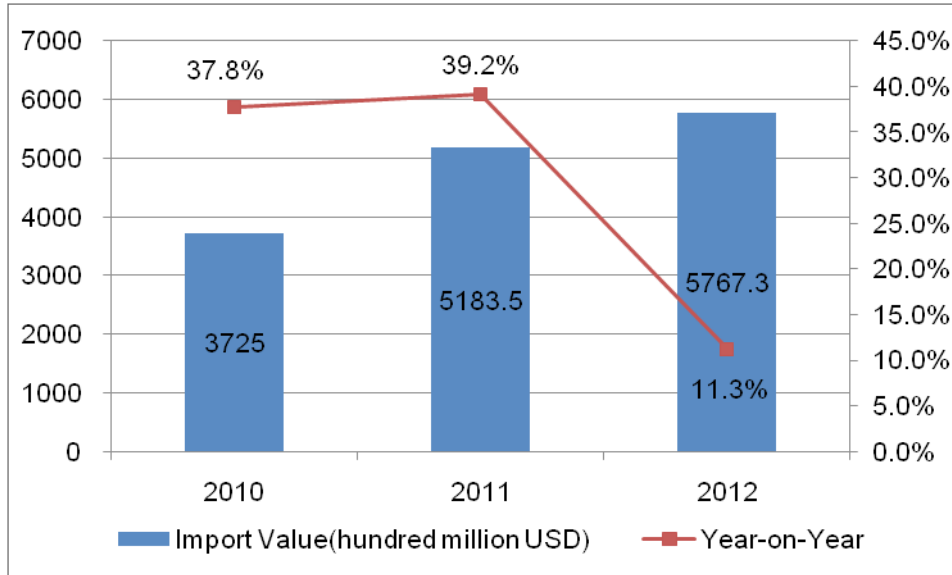


From Jan. to June in 2013, among the top ten export destination countries/regions, the export volume of Japan increased the largest (with an increase of 235.5% year on year), followed by France (with an increase of 118.6% year on year), while the export value of France increased the largest (with an increase of 98% year on year), followed by the United States (with an increase of 86.2% year on year).

Source: Customs Information Network

3. Global Jewelry Import and Export Analysis

3.1. Global Import Value Trend of Jewelry (HS: 71) from 2010 to 2012



The total import value of global jewelry increased year by year from 2010 to 2012, and the import value of 2012 amounted to 576.73 billion US dollars, with an increase of 11.3% year on year.

3.2. Jewelry (HS: 71) Main Importing Countries in the First Quarter of 2013

Main Import Countries/Regions	Import Value of the First Quarter of 2013 (thousand US dollars)	Year on Year
India	23,932,789	11.2%
USA	16,481,963	6.1%
UK	12,832,810	-22.3%
Thailand	7,501,374	53.2%
Belgium	5,777,591	-6.5%
Germany	4,963,749	-9.0%
Switzerland	4,287,017	-5.1%
Canada	3,747,378	-2.4%
China	3,527,157	13.5%
Turkey	3,059,530	229.0%

Jewelry main importing countries/regions are India, the United States, the United Kingdom, Thailand, Belgium, Germany, Switzerland, Canada, China and Turkey. It is noteworthy that Turkey's import value of jewelry in 2013 increased by 228.98% year on year, which is a significant increase.

Bourse Istanbul published data on Thursday (2013-5-2) showed that the import volume of Turkey in April, one of the world's biggest gold buyer exceeded import volume of every month since August 2008. Because the gold price fell to a two-year low position which lead to a surge in demand for gold.

Data showed that Turkey's import volume of gold in April jumped to 45.49 tons, which is more than twice of the export volume of March 18.26 tons. The country's annual import volume of gold in 2012 amounted to 120.78 tons.

In April the price of gold plummeted to the two-year low point near 1321, partly because the market is concerned about the news of Cyprus considering selling gold reserves to finance the international rescue plan.

The gold price has been recovered, but the loss is still more than 12% so far this year. On Thursday, stimulated by ECB reducing the interest rate for the first time in the ten months, The gold price rose more than 1% at one time, but was under pressure due to EUR weakness and US dollar rise caused by interest rate reduce.

Turkey is not a major producer of gold. In 2011, the country was a net importer of gold, jewelry and precious metals, but in 2012 the country tend to become a net exporter, for the country began to ship to Iran gold worth hundreds of millions of dollars.

As Iran's largest natural gas consumer, Turkey bought energy from Iran with Lira, because the western countries take sanctions against Iran's disputed nuclear program, which made Iran unable to receive payment of US dollars or Euros. Iran used Lira Turkey paid to buy gold in Turkey.

3.3. Jewelry (HS: 71) Main Export Countries/Regions in the First Quarter of 2013

Main Export Countries/Regions	Export Value of the First Quarter of 2013 (thousand US dollars)	Year on Year
UK	21,246,896	135.2%
USA	20,707,526	5.7%
China	17,103,221	117.7%
India	12,334,486	3.5%
Canada	6,501,048	10.9%
Belgium	5,144,104	-17.4%
Switzerland	4,933,623	11.1%
Germany	4,893,595	-7.7%
Italy	4,504,809	-1.2%
Australia	4,424,163	12.5%

According to statistics of the first quarter of 2013, the United Kingdom was the first exporter of jewelry. The United Kingdom's export value of jewelry in the first quarter of 2013 amounted to 21.25 billion US dollars, with an increase of 135.2%, followed by the United States, with the export value of 20.71 billion US dollars, with an increase of 5.7%. China ranked the third, and the export value of which was 17.1 billion US dollars, with an increase of 117.7%.

Source: UN COMTRADE

4. The United States Jewelry (HS: 71) Import Trend Analysis in 2013

Countries/ Regions	Total Import Value of Jan.-May 2013 (thousand US dollars)	Year on Year	Percentage
Total	29,385,786	9.38%	100.00%
Israel	4,030,106	-0.82%	13.71%
India	3,961,859	39.19%	13.48%
Canada	3,689,569	38.06%	12.56%
Mexico	3,347,600	-19.60%	11.39%
Belgium	1,845,124	6.34%	6.28%
China	1,464,405	0.89%	4.98%
Columbia	1,173,781	4.37%	3.99%
Peru	1,105,412	113.23%	3.76%
South Africa	1,024,929	-11.02%	3.49%
Switzerland	770,401	15.23%	2.62%

Israel is the United States' largest import source country of jewelry, accounted for 13.71% of the total import value, followed by India, accounting for 13.48% of the total import value. China ranked the sixth, accounting for 4.98% of the total import value.

5. The United Kingdom Jewelry (HS: 71) Import Trend Analysis in 2013

Countries/ Regions	Total Import Value of Jan.-May 2013 (thousand US dollars)	Year on Year	Percentage
Total	17,197,033	-34.20%	100.00%
Canada	4,698,536	-18.79%	27.32%
USA	2,043,903	-54.18%	11.89%
Botswana	2,000,261	46.50%	11.63%
Switzerland	1,520,928	-42.76%	8.84%
Germany	1,012,756	-18.62%	5.89%
South Africa	705,449	-70.54%	4.10%
Japan	561,709	-35.94%	3.27%
Spain	522,625	-25.85%	3.04%
France	506,387	63.16%	2.94%
Poland	377,775	3.66%	2.20%

Canada is the United Kingdom's largest import source country of jewelry, accounted for 27.32% of the total import value, followed by the United States, accounting for 11.89% of the total import value.

6. India Jewelry (HS: 71) Import Trend Analysis in 2013

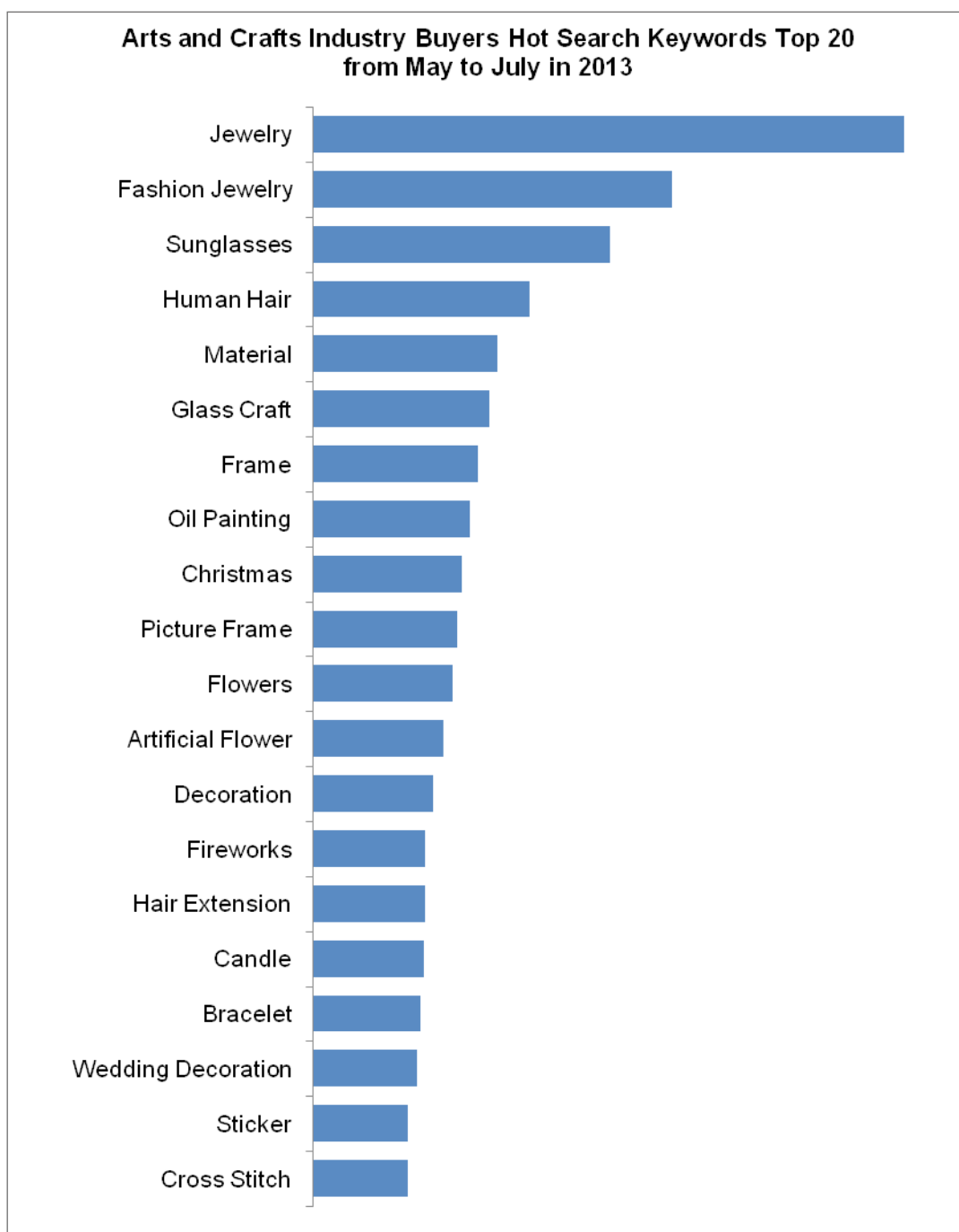
Countries/ Regions	Total Import Value of Jan.-May 2013 (thousand US dollars)	Year on Year	Percentage
Total	44,036,914	30.52%	100.00%
Switzerland	17,985,855	51.32%	40.84%
UAE	9,162,486	32.86%	20.81%
Belgium	3,421,114	-5.55%	7.77%
South Africa	2,949,525	41.11%	6.70%
Hong Kong	2,867,698	29.23%	6.51%
UK	1,442,463	80.04%	3.28%
USA	1,401,028	35.94%	3.18%
Australia	1,348,396	-9.83%	3.06%
China	594,905	7.72%	1.35%
Israel	504,599	-10.57%	1.15%

Switzerland is India's largest import source country of jewelry, accounted for 40.84% of the total import value, followed by the UAE, accounting for 20.81% of the total import value.

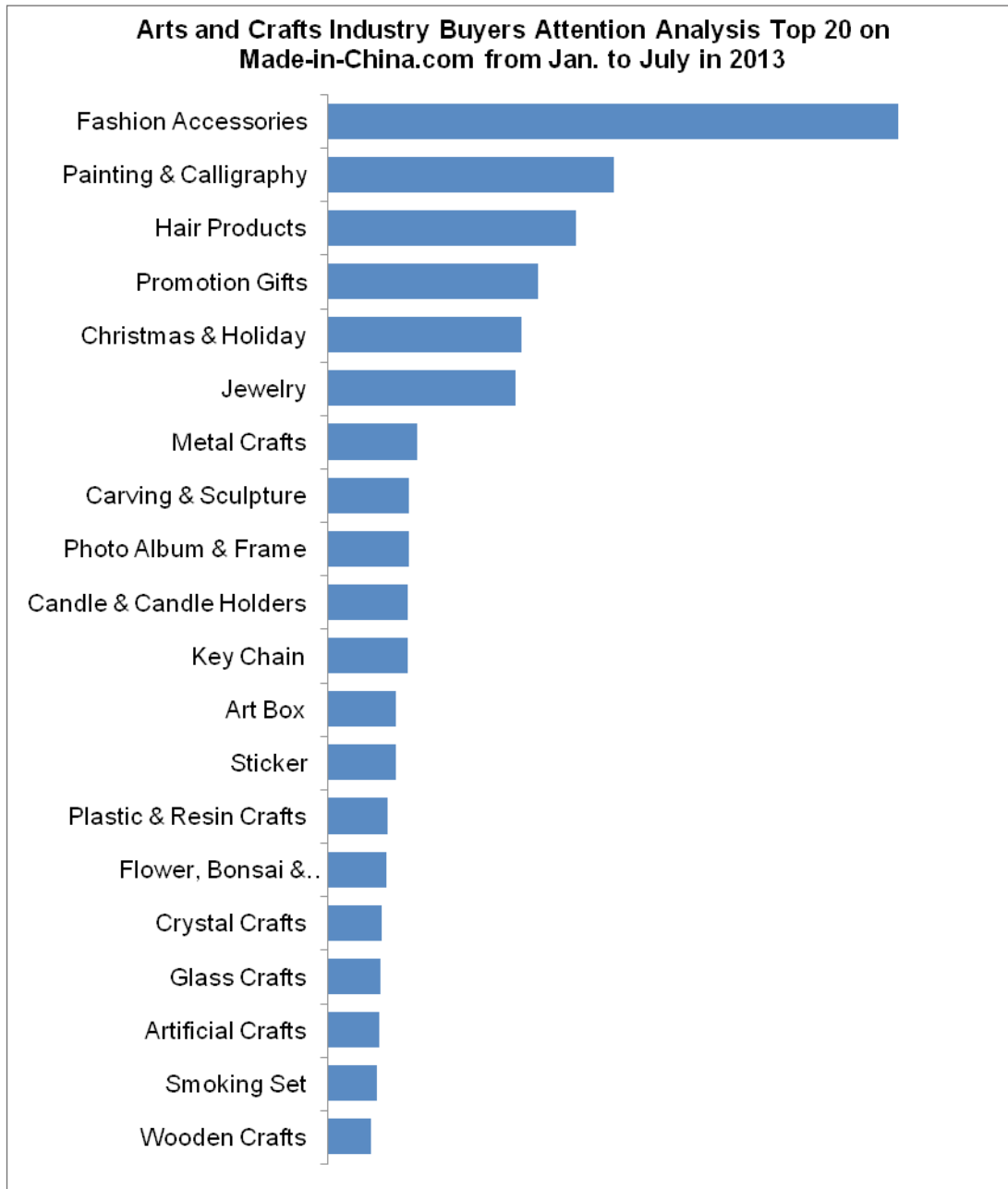
Source: UN COMTRADE

7. Arts and Crafts Industry Data Analysis on Made-in-China.com

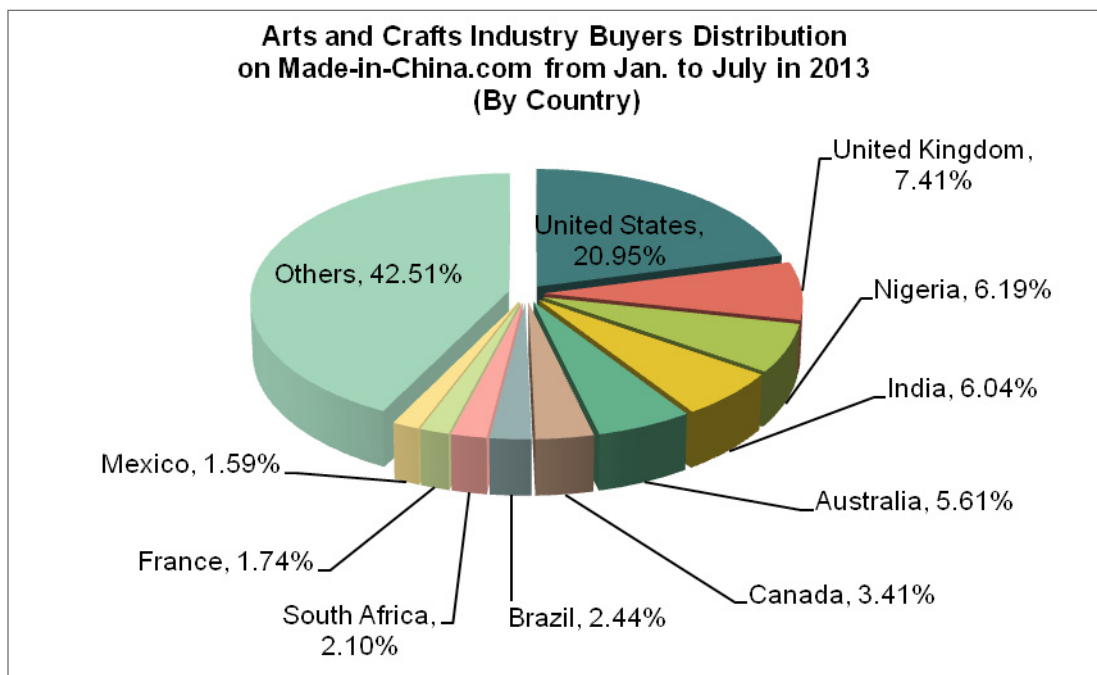
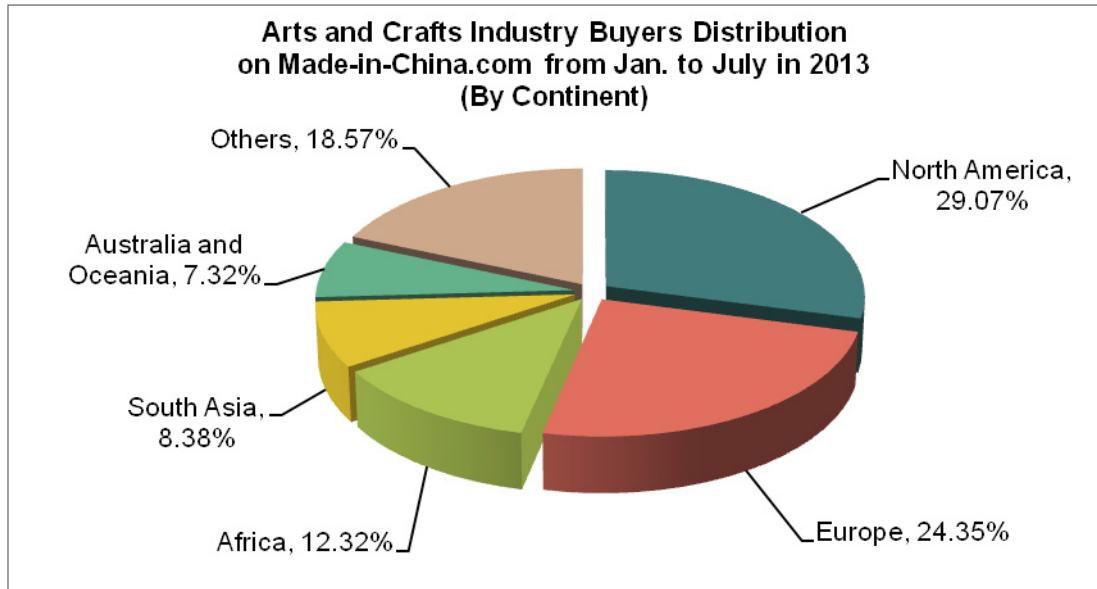
7.1. Arts and Crafts Industry Buyers Hot Search Keywords on Made-in-China.com from May to July in 2013



7.2. Arts and Crafts Industry Buyers Attention Analysis on Made-in-China.com from Jan. to July in 2013 (By click rate)



7.3. Arts and Crafts Industry Buyers Distribution on Made-in-China.com from Jan. to July in 2013



Source: Made-in-China.com

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Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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