



中国珠宝市场发展报告

C h i n a J e w e l r y M a r k e t D e v e l o p m e n t R e p o r t

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中国珠宝玉石首饰行业协会

Gems & Jewelry Trade Association of China

报告发布的目的 Purpose of the Report's Release

向国际珠宝同行介绍中国珠宝市场的发展情况

促进中外珠宝业界的交流与合作

为国际珠宝企业投资中国市场提供参考

Introduce the development of the Chinese jewelry market to international jewelry peers.

Promote exchange and cooperation between Chinese and global jewelry sectors.

Provide references for international jewelry enterprises investing in the Chinese market.

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创造新机遇

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Jewelry Brands

PART ONE

零售与需求：增长率持续领跑其他品类

Retail and Demand: Jewelry Continues to Lead in Growth Rate Over Other Categories



2023年前三季度：珠宝零售强劲复苏

First Three Quarters of 2023: Strong Resurgence in Jewelry Retail



2023年1-9月部分消费类型零售额同比增幅

Year-on-Year Growth in Retail Sales of Selected Consumer Categories from January to September 2023

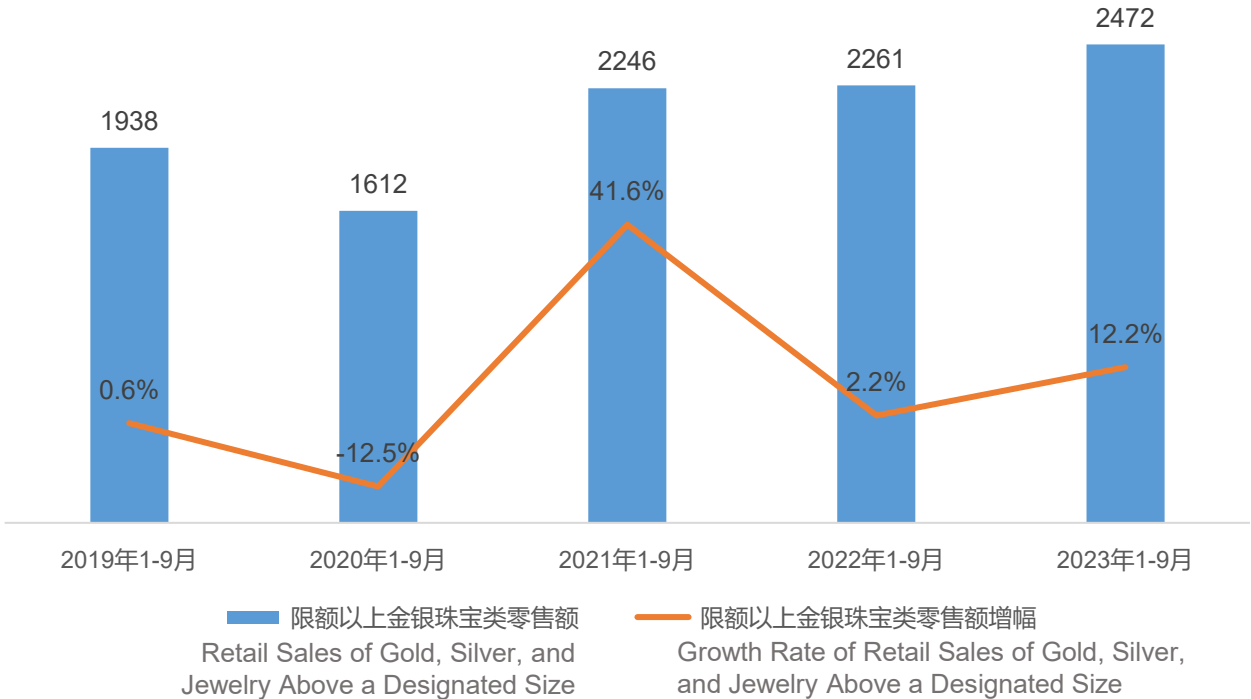
数据来源：国家统计局

近五年零售增长情况

Retail Growth Trends Over the Past Five Years

单位：亿元

Unit: 0.1 Billion CNY



近五年1-9月限额以上金银珠宝类零售额及其增幅

Retail Sales and Growth Rate of Gold, Silver, and Jewelry Above a Designated Size from January to September Over the Past Five Years

PART TWO

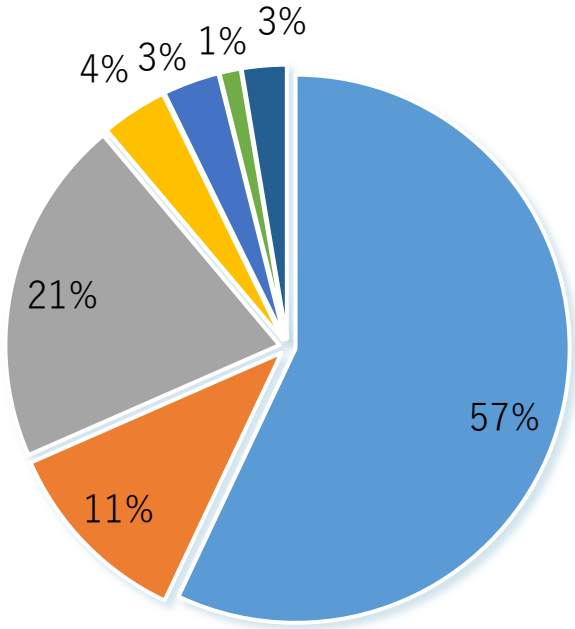
市场规模：基数大、增长稳

Market Scale: Large Base and Steady Growth



稳居7000亿元以上

Stably Exceeding 700 Billion CNY



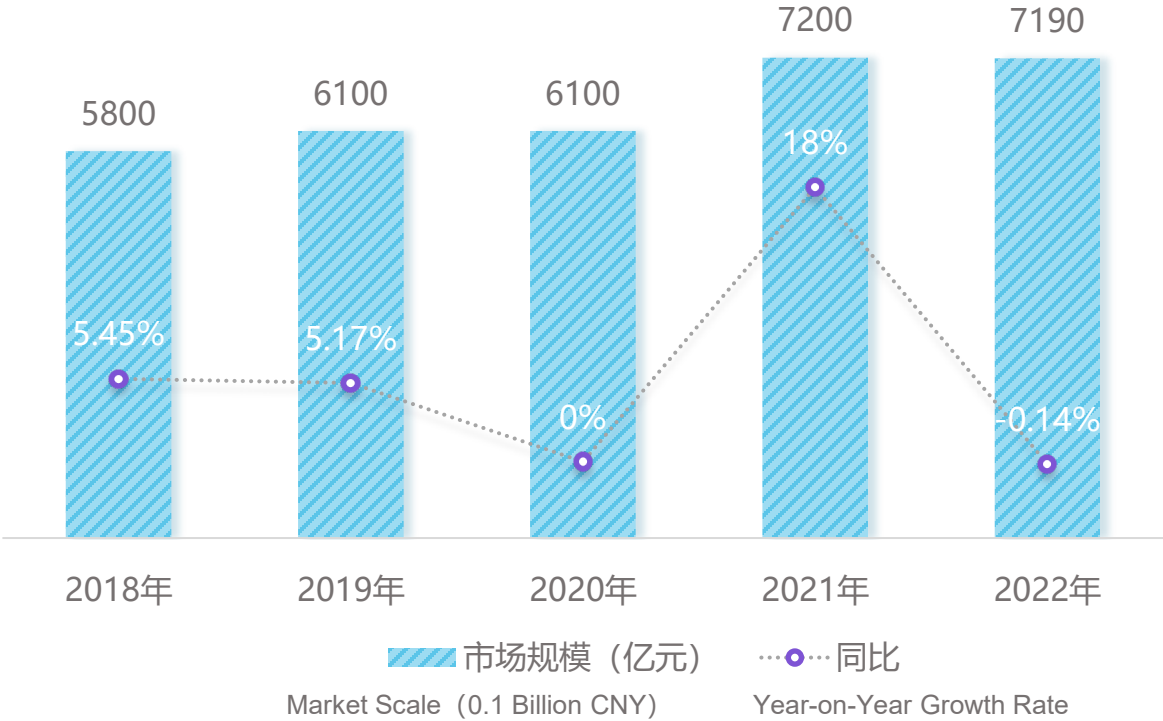
- 黄金产品 Gold Products 4100亿元/ 410 Billion CNY
- 钻石产品 Diamond Products 820亿元/ 82 Billion CNY
- 玉石产品 Jade Products 1470亿元/ 147 Billion CNY
- 彩色宝石产品 Colored Gemstone Products 280亿元/ 28 Billion CNY
- 珍珠产品 Pearl Products 240亿元/ 24 Billion CNY
- 铂金及银产品 Platinum and Silver Products 90亿元/ 9 Billion CNY
- 其他类产品 Other Types of Products 190亿元 / 19 Billion CNY

2022年中国珠宝首饰行业市场细分品类占比

Market Share of Segmented Categories in China's Jewelry Industry in 2022

年均增幅5.5%

Average Annual Growth Rate of 5.5%



2017-2022年珠宝首饰市场规模及其增长速度

Market Scale and Growth Rate of Jewelry Industry from 2017 to 2022

PART THREE

主要品类发展情况：持续稳健增长

Development of Major Jewelry Categories: Continued Steady Growth



01

中国是全球最大的黄金消费市场

China is the World's Largest Gold Consumption Market

01

今年前三季度，我国黄金消费量835吨，同比增长7.32%

In the first three quarters of this year, China's gold consumption reached 835 tons, a year-on-year increase of 7.32%.

02

全球最大的黄金消费国

自2013年以来中国一直保持着全球最大的黄金消费国的地位。

2022年，中国市场在全球金饰总需求中占比超过27%

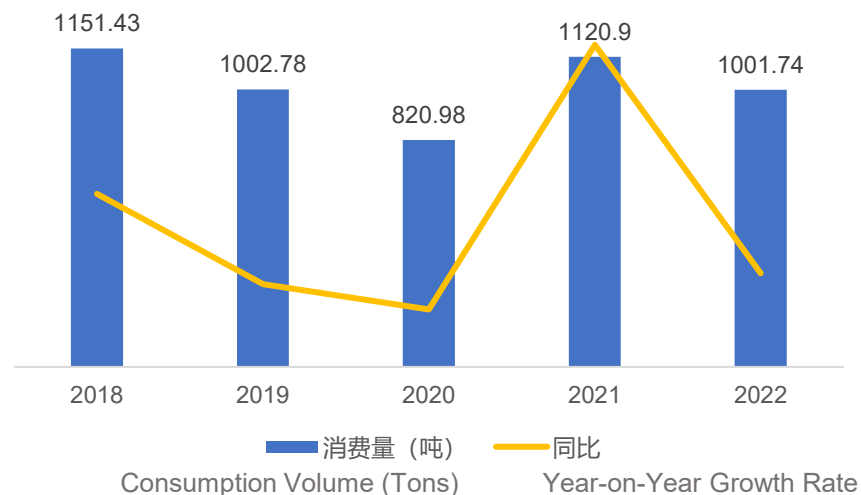
Since 2013, China has consistently held the position of the world's largest gold consumer. In 2022, the Chinese market accounted for over 27% of the global total gold jewelry demand.

03

全球最大的黄金生产国

中国连续14年是全球最大的黄金生产国，年均生产黄金保持在300吨以上。

China has been the world's largest gold producer for 14 consecutive years, with an annual gold production averaging over 300 tons.



2018-2022年我国黄金消费量

Gold Consumption Volume in China from 2018 to 2022

数据来源：中国黄金协会、世界黄金协会

02

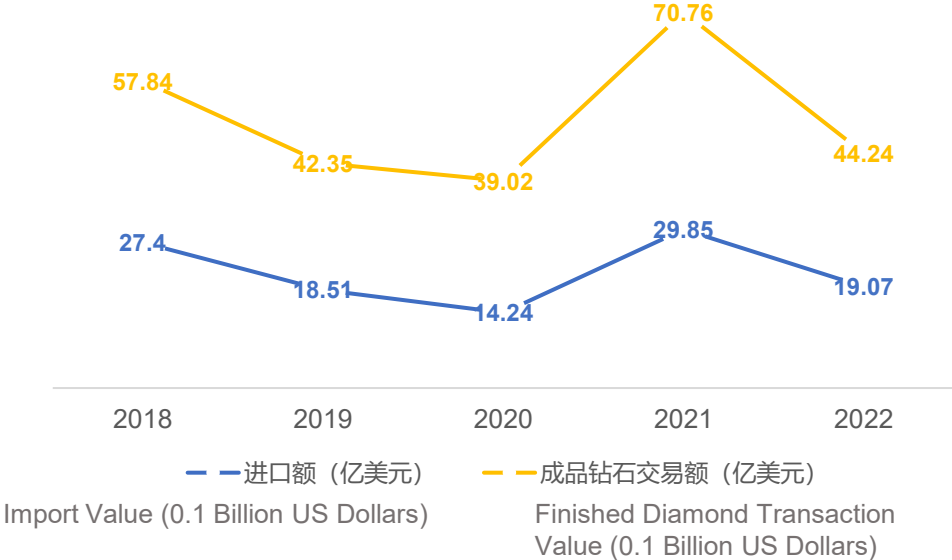
钻石市场：周期性波动，消费者认同度依然保持高位

Diamond Market: Cyclical Fluctuations with Sustained High Consumer Acceptance



2022年我国钻石市场规模同比下降18%

In 2022, China's diamond market scale decreased by 18% year-on-year.



2018-2022年上海钻交所钻石交易总额和一般贸易项下成品钻净进口额
Total Diamond Transaction Value and Net Imports of Finished Diamonds under General Trade at the Shanghai Diamond Exchange from 2018 to 2022



74%的中国消费者依然认为天然钻石仍具有不可替代的情感价值和收藏价值

74% of Chinese consumers still believe that natural diamonds possess irreplaceable emotional and collectible value.

数据来源：上海钻交所

03

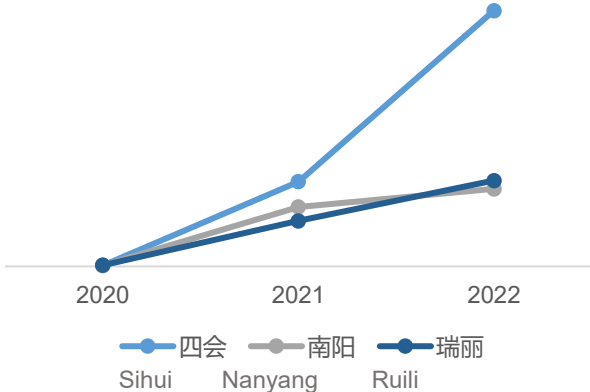
中国是全球最大的翡翠玉石消费市场

China is the world's largest consumer market for jadeite and jade stones

2019-2022年我国玉石市场规模 (单位: 亿元)
Jadeite and Jade Stone Market Scale in China from 2019 to 2022 (Unit: 0.1 Billion CNY)

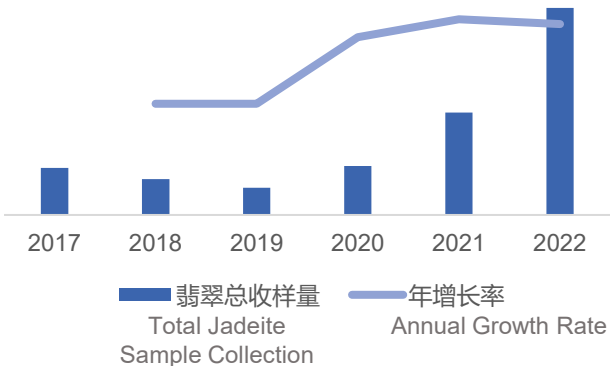


中国主要翡翠玉石集散地
2020-2022年NGTC在电商平台的收样量

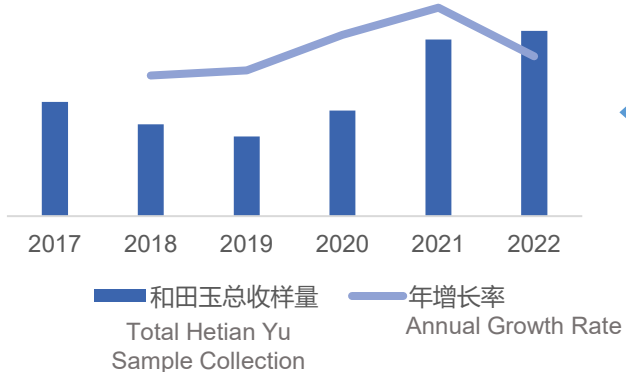


2020-2022 NGTC Sample Collection on E-commerce Platforms in China's Major Jadeite and Jade Stone Distribution Centers

2017-2022年NGTC翡翠总收样量及年增长率
Total Jadeite Sample Collection and Annual Growth Rate of NGTC from 2017 to 2022



2017-2022年NGTC和田玉总收样量及年增长率



Total Tian Yu Sample Collection and Annual Growth Rate of NGTC from 2017 to 2022

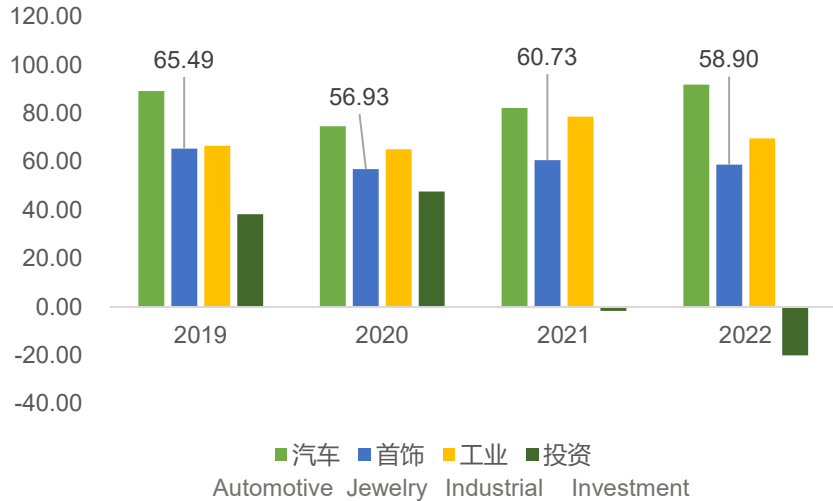
数据来源: NGTC

铂金首饰市场面临深度调整

The platinum jewelry market is undergoing a significant restructuring

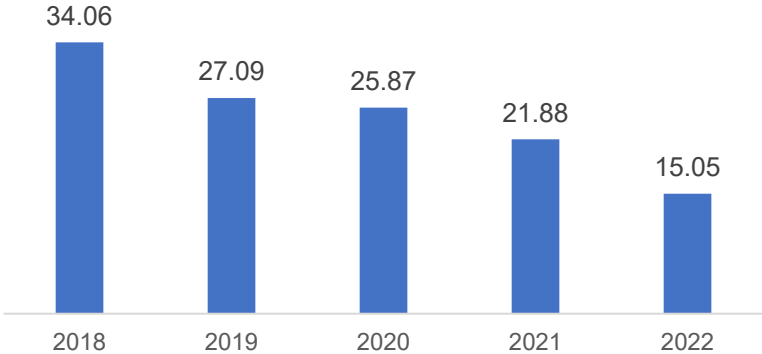
中国铂金首饰需求连续下滑，但依然是全球第一大铂金首饰消费国。

China's demand for platinum jewelry has been continuously declining, but it still remains the world's largest consumer of platinum jewelry.



2019-2022年全球铂金需求分布 (单位: 吨)

Global Platinum Demand Distribution from 2019 to 2022 (Unit: Tons)



2018-2022年中国铂金首饰需求 (单位: 吨)

Platinum Jewelry Demand in China from 2018 to 2022 (Unit: Tons)

数据来源: 世界铂金投资协会

彩宝、珍珠市场：稳健坚挺

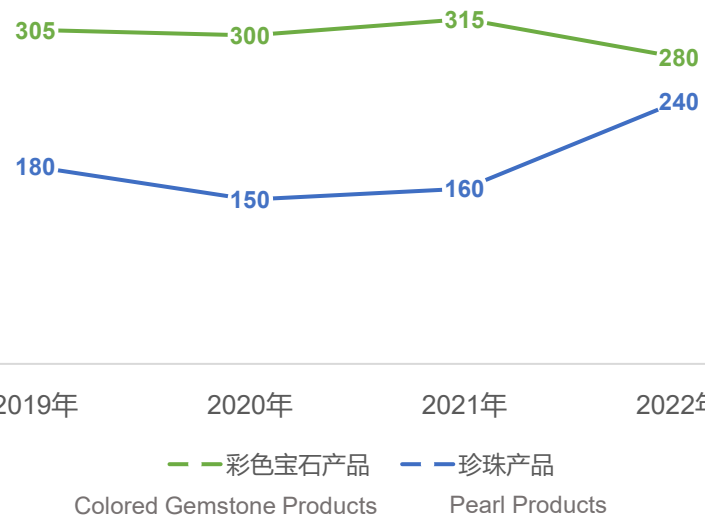
Colored Gemstones and Pearl Market: Steady and Resilient

彩宝： 销量稳定，价格上升。

Colored Gemstones: Stable Sales Volume, Rising Prices.

珍珠： 量价齐升。

Pearl: Simultaneous Increase in Volume and Price.



2019-2022年中国彩色宝石和珍珠的市场规模（单位：亿元）

Market Scale of Colored Gemstones and Pearls in China from 2019 to 2022

(Unit:0.1 Billion CNY)

PART FOUR

进出口情况：进口需求大，多年贸易逆差

Import-Export Situation: High Import Demand and Persistent Trade Deficit Over the Years

01

今年前三季度进出口增势强劲

Strong Growth in Imports and Exports in the First Three Quarters of This Year

珠宝商品类进出口总额

Total Import and Export Value of Jewelry Commodities

1106.5

亿美元
0.1 Billion USD

19.6% ↑

出口方面

Exports

227.9

亿美元
0.1 Billion USD

12.5% ↑

进口方面

Imports

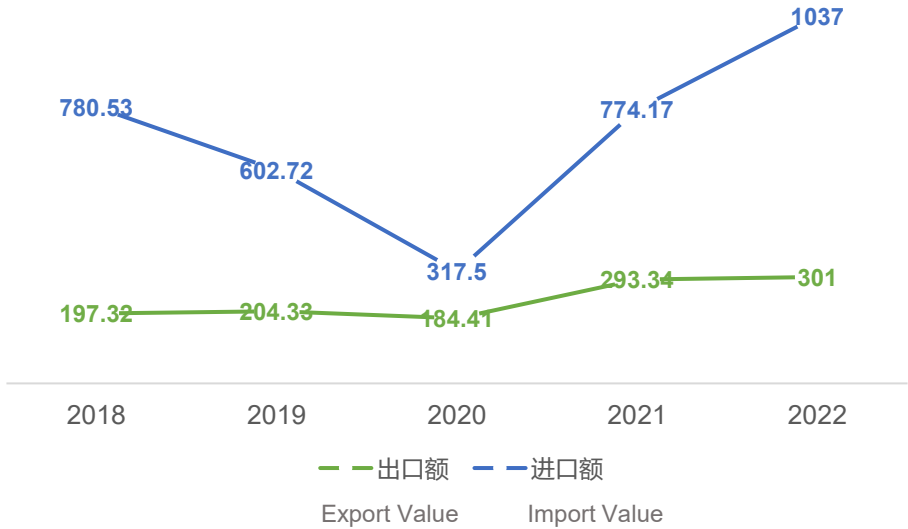
878.6

亿美元
0.1 Billion USD

22.5% ↑

“V”型反弹，凸显供应链韧性

V-Shaped Rebound Highlighting Supply Chain Resilience



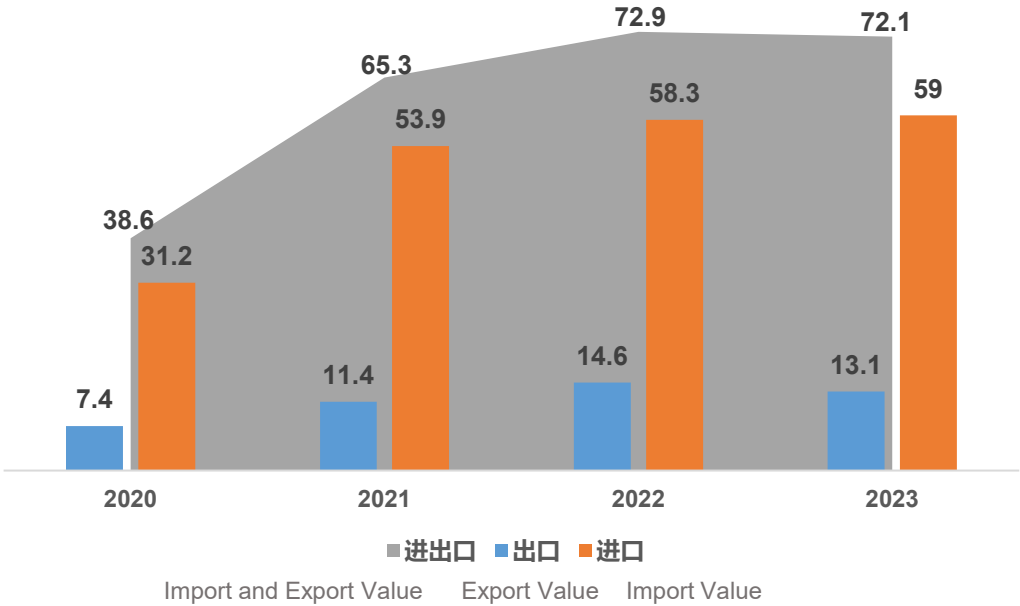
2018-2022年中国珠宝行业进出口总额（单位：亿美元）

Total Import and Export Value of the China's Jewelry Industry from 2018 to 2022 (Unit: 0.1 Billion USD)

数据来源：海关总署

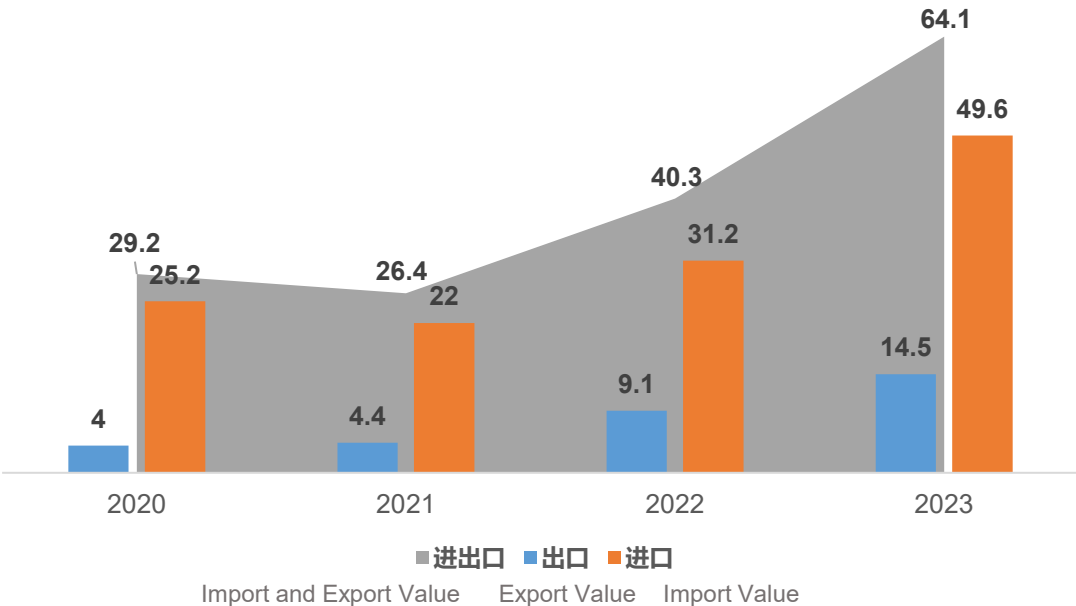
中国与主要珠宝贸易伙伴关系日趋紧密

China's relationship with its major jewelry trade partners is increasingly becoming closer



2020-2023前三季度欧盟国家珠宝类商品进出口额(单位：亿美元)

Import and Export Value of Jewelry Commodities for EU Countries in the First Three Quarters of 2020-2023 (Unit: 0.1 Billion USD)



2020-2023前三季度东盟国家珠宝类商品进出口额 (单位：亿美元)

Import and Export Value of Jewelry Commodities for ASEAN Countries in the First Three Quarters of 2020-2023 (Unit: 0.1 Billion USD)

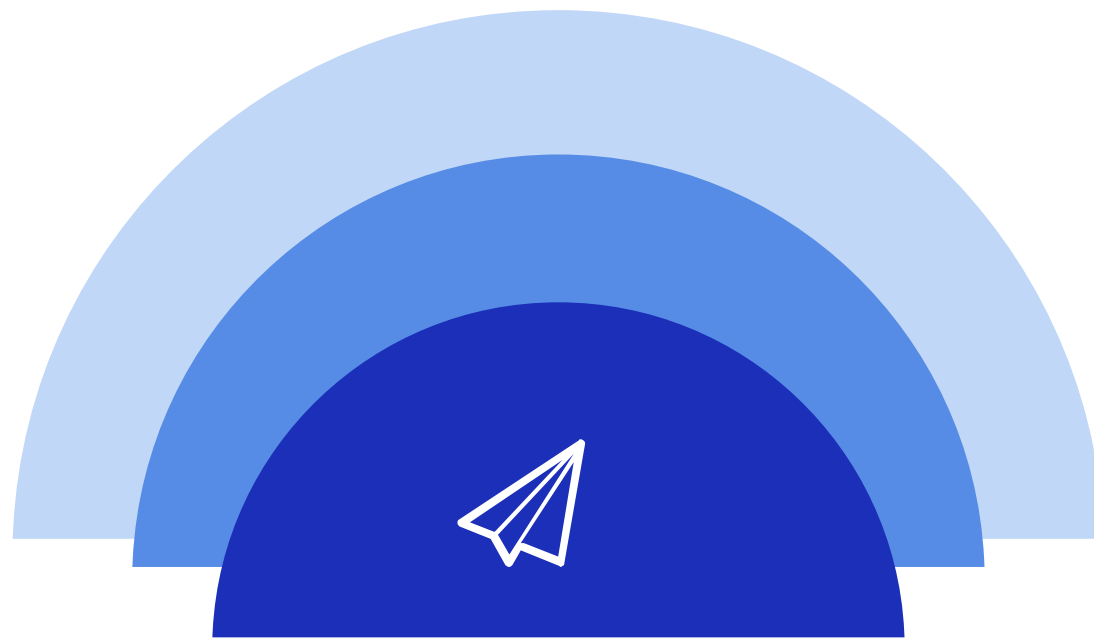
数据来源：海关总署

今年前三季度，中国对美国、加拿大、巴西、智利、阿根廷等5个美洲国家的珠宝类出口额总计21.27亿美元，同比下滑4.8%；进口额为105亿美元，同比增加28.5%

in the first three quarters of this year, China's total exports of jewelry to five American countries, including the United States, Canada, Brazil, Chile, and Argentina, amounted to \$2.127 billion, marking a 4.8% decline year-on-year. The imports stood at \$10.5 billion, showing a year-on-year increase of 28.5%.

今年前三季度，中国对南非的进出口总额为117亿美元。

in the first three quarters of this year, the total import and export volume with South Africa amounted to \$11.7 billion.



PART FIVE

珠宝电商发展势头强劲

The Jewelry E-commerce Sector is Experiencing Strong Growth Momentum





2023年上半年全国网上零售额达
7.16万亿元，同比增长**13.1%**

In the first half of 2023, the national online retail sales reached 7.16 trillion CNY, a year-on-year increase of 13.1%.



在18类监测商品中，金银珠宝类增
速最快，为**33.5%**

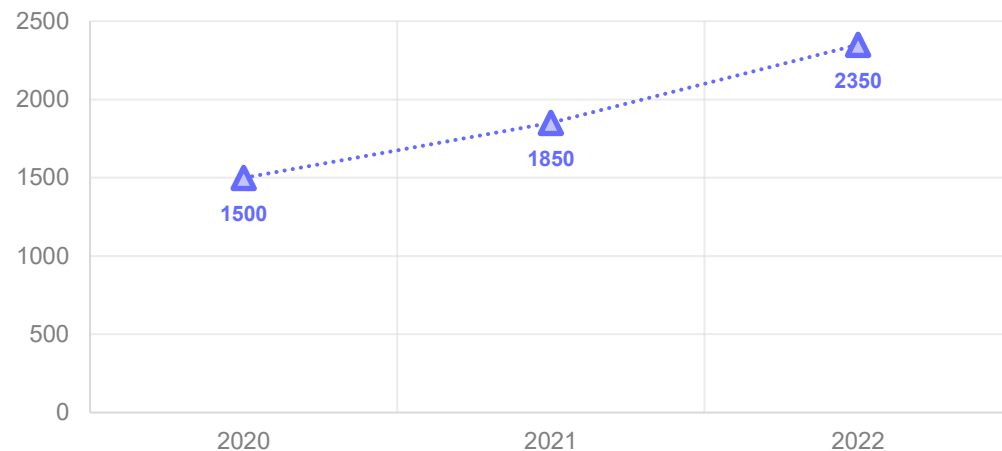
Among the 18 monitored product categories, the gold, silver, and jewelry category had the fastest growth rate at 33.5%.

商务部数据

Data from the Ministry of Commerce of People's Republic of China

2020-2022珠宝电商销售规模 (单位: 亿元)

Jewelry E-commerce Sales Scale from 2020 to 2022 (Unit: 0.1 Billion CNY)



中宝协数据

Data from the Gems & Jewelry Trade Association of China

PART SIX

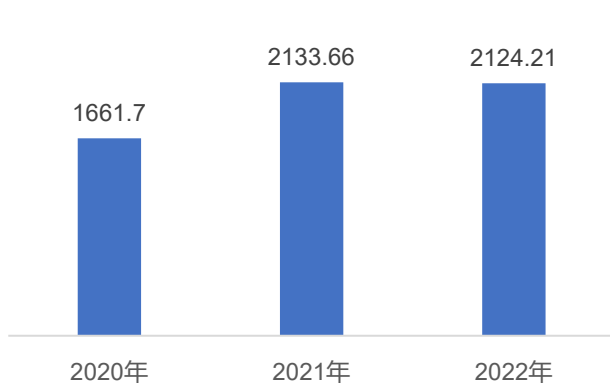
头部品牌市场份额占据半壁江山

The top brands dominate a significant market share



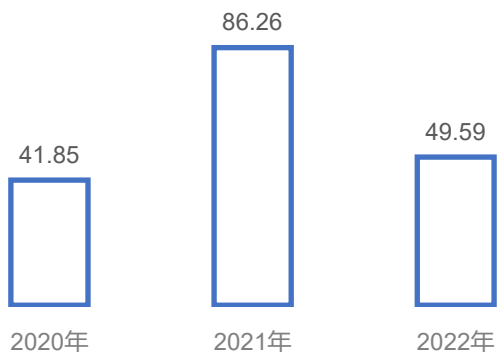
A股

A-shares Listed Companies



A股14家上市公司2020-2022年营业收入总额 (单位: 亿元)

Total Operating Income of 14 A-share Listed Companies from 2020 to 2022 (Unit: 0.1 Billion CNY)

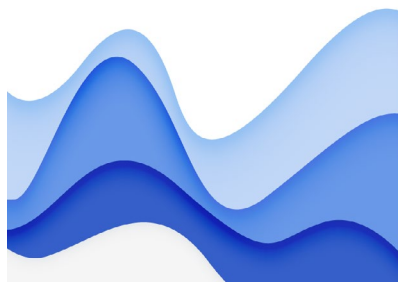


A股14家上市公司2020-2022年归属于上市公司股东的净利润 (单位: 亿元)

Net Profit Attributable to Shareholders of 14 A-share Listed Companies from 2020 to 2022 (Unit: 0.1 Billion CNY)

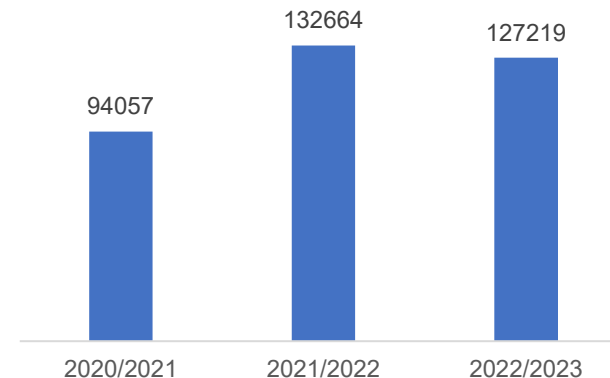
截至2022年
前八大品牌
市场占有率
达43.1%

As of 2022, the eight major brands collectively hold a market share of 43.1%



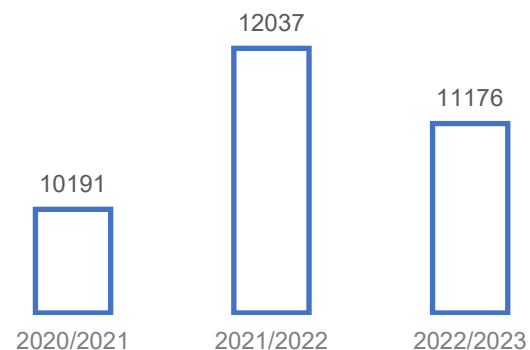
港股

Hong Kong-listed Companies



港股3家上市公司2020/2021-2022/2023财年营业收入总额 (单位: 百万港元)

the total revenue for the fiscal years 2020/2021-2022/2023 of three Hong Kong-listed companies (Unit: Million HKD)

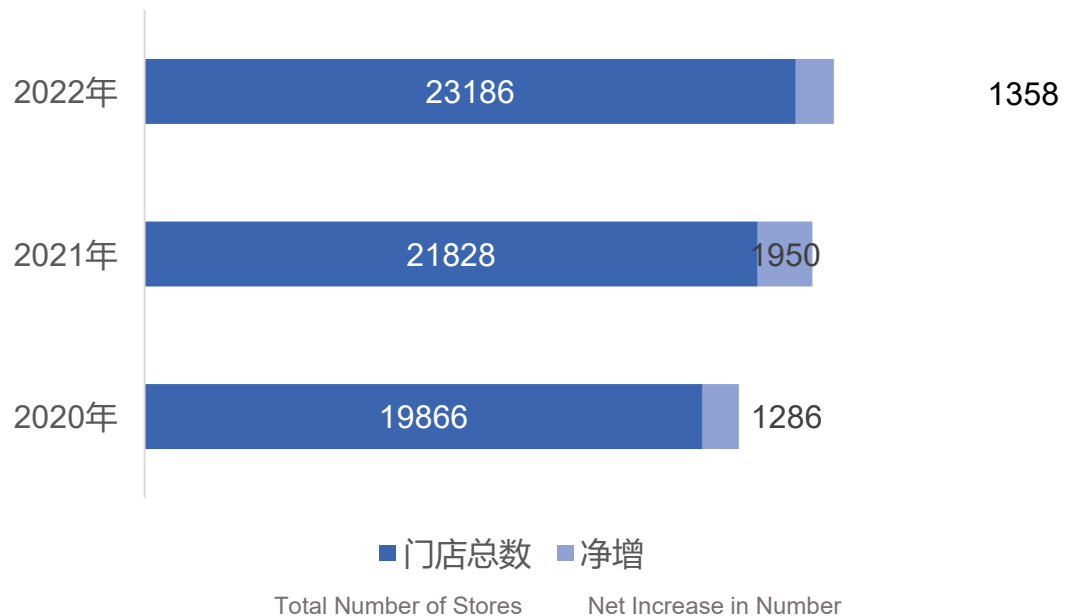


港股3家上市公司2020/2021-2022/2023财年股东应占溢利 (单位: 百万港元)

Shareholder's Attributable Profit for 3 Hong Kong-listed Companies in the 2020/2021-2022/2023 Financial Years (Unit: Million HKD)

A股

A-shares Listed Companies

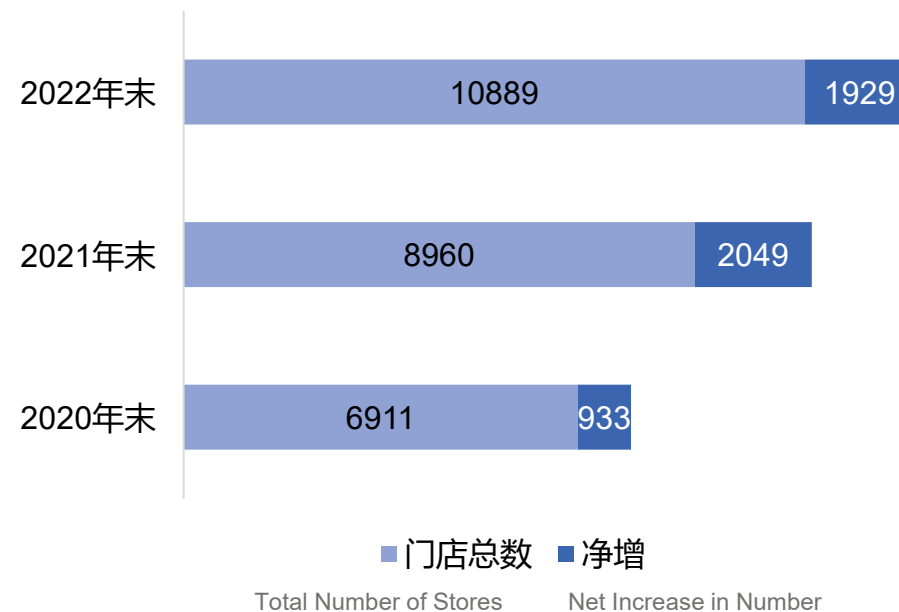


2020年末-2022年末A股企业开设门店数

The Number of Stores Opened by A-share Companies from the End of 2020 to the End of 2022

港股

Hong Kong-listed Companies



2020年末-2022年末3家港股企业在内地开设门店数

The Number of Stores Opened in Mainland China by 3 Hong Kong-listed Companies from the End of 2020 to the End of 2022

PART SEVEN

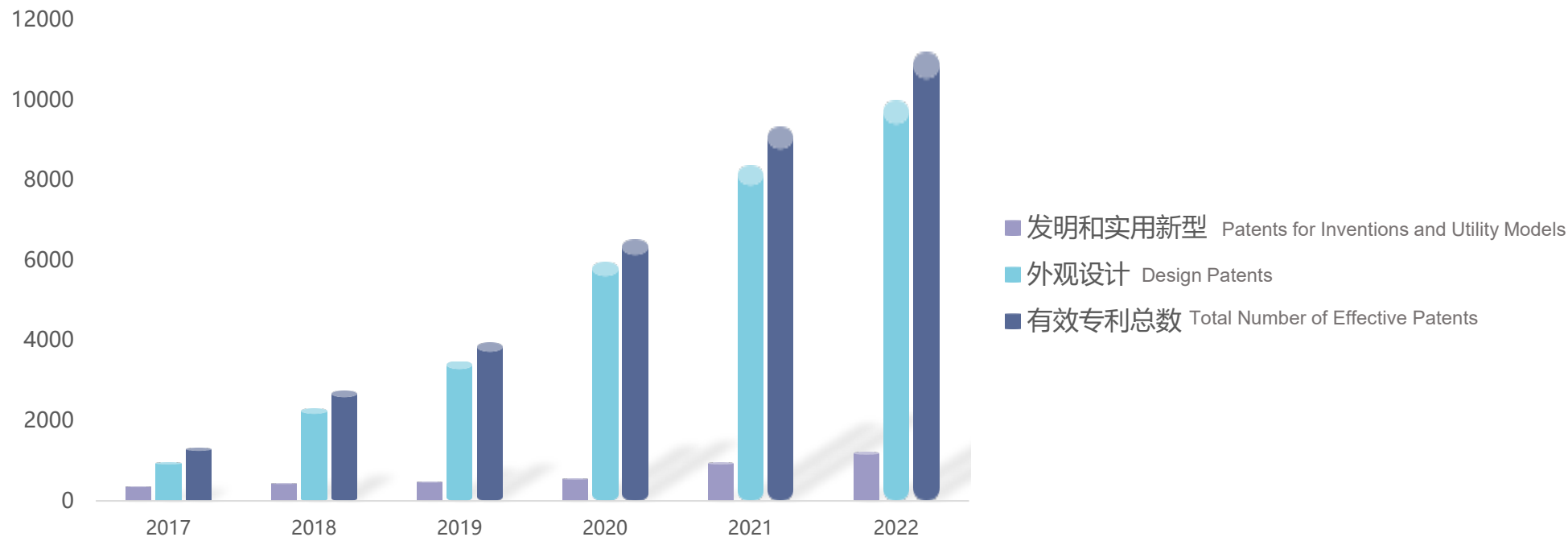
专利数量大幅增加，创新活力凸显

The significant increase in the number of patents highlights the surge in innovative vitality



通过对国际专利数据库的数据分析表明，自2010年起中国黄金珠宝类目专利申请量跃居世界第一并连续保持至今。

Data analysis of international patent databases indicates that since 2010, China has surged to the top position in the world in terms of patent applications for gold and jewelry categories and has continuously maintained this lead to the present.



2017-2022年中国珠宝行业有效专利情况 (单位: 件)

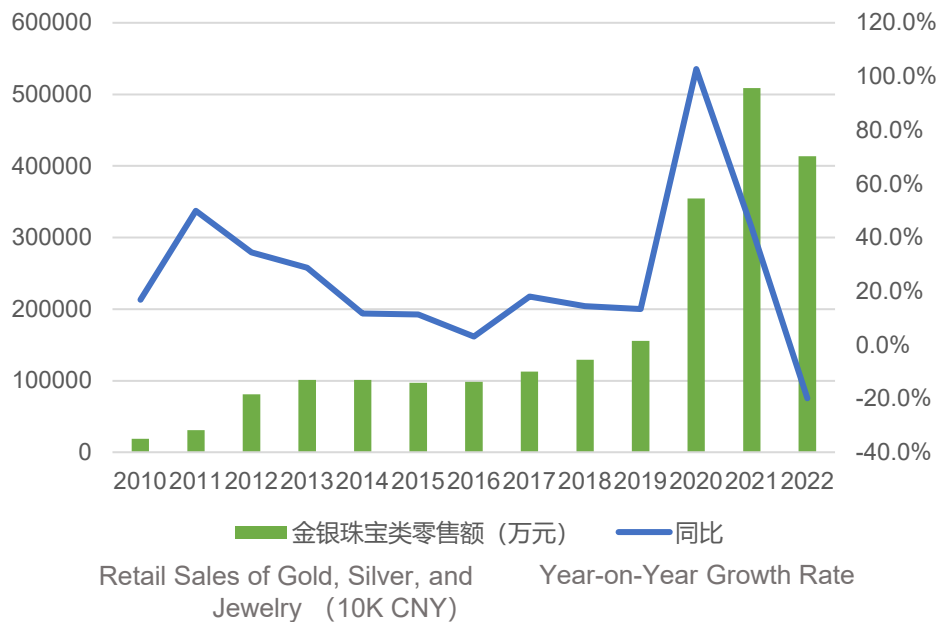
Situation of Effective Patents in China's Jewelry Industry from 2017 to 2022 (Unit: Cases)

PART EIGHT

海南自贸港为珠宝品牌创造新机遇

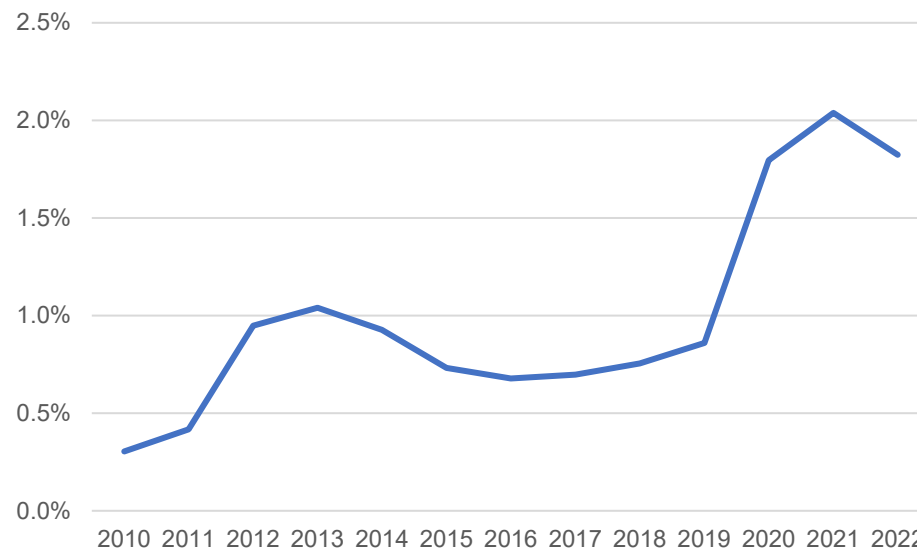
Hainan Free Trade Port Creates New Opportunities for Jewelry Brands





2010-2022年海南省限额以上金银珠宝类零售额及增速

Retail Sales and Growth Rate of Gold, Silver, and Jewelry Above a Designated Size in Hainan Province from 2010 to 2022



海南省限额以上金银珠宝类零售额在社会消费品零售总额中的占比

The proportion of retail sales of gold, silver, and jewelry Above a Designated Size in Hainan Province as a percentage of the total retail sales of consumer goods

数据来源：海南省统计局

感谢聆听!

T h a n k s f o r y o u r a t t e n t i o n !

中英文版报告将于近期在中宝协官网发布，敬请关注!

The Chinese and English versions of the report will be published soon on the official website of the Gems & Jewelry Trade Association of China. Please stay attentive for the update!

