

GEMS AND JEWELRY SECTOR





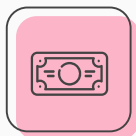
CONTRIBUTES 7% TO INDIA'S GDP



EMPLOYS 4.64 MILLION PEOPLE



US \$75BILLION MARKET SIZE



300,000 PLAYERS

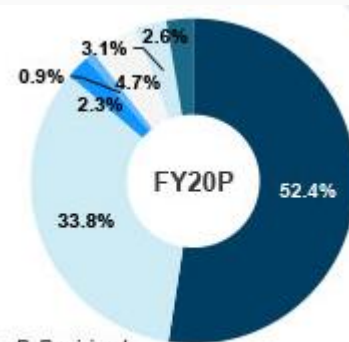


LABOR INTENSIVE



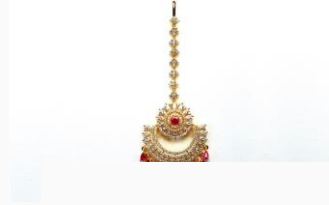
EXPORT ORIENTED

SECTOR COMPOSITION



Note: P- Provisional
Source: GJEPC

- Cut and Polished Diamonds
- Gold Jewellery
- Gold Medallions and Coins
- Coloured Gemstones
- Silver Jewellery
- Rough Diamonds
- Others



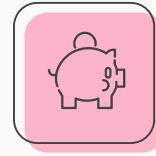
- Necklace
- Earrings
- Mangtika
- Bangles
- Waist Bands
- Arm Bands
- Nose Ring
- Rings
- Toe Rings

JEWEL'S CLASSIFICATION



JEWELRY AND PRECIOUS METALS

- Silver
- Platinum
- Gold



GEMSTONES

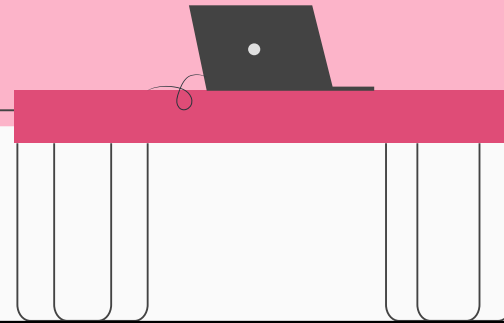
- Pearl
- Coral
- Emerald
- Ruby
- Topaz
- Cat's Eye
- Blue Sapphire
- Yellow Sapphire





BUSINESS OPPORTUNITIES

- Increase in middle class population
- Increase in disposable income of an average Indian
 - Changing consumption patterns
- Increasing number of working women → Rise in demand for artificial and workwear jewelry
 - More exposure to western lifestyle



OPPORTUNITIES ACROSS THE VALUE-CHAIN



MINING

Extraction of gold
Extraction of diamonds

JEWELRY MANUFACTURING

Melting of gold
Setting diamonds/
colored stones into gold
Furnishing and testing the
product before introducing
for retail

GEMSTONE PROCESSING

Planning of cut
Cutting of diamonds
Polishing of diamonds

JEWELRY RETAILING

Customer facing
Marketing
Branding
Selling

CERTIFICATION TECHNOLOGY

GOVERNMENT INITIATIVES



GOLD MONETISATION SCHEME

- Enables individuals, trusts and mutual funds to deposit gold with banks and earn interest on the same in return



BIS HALLMARK SCHEME

- The BIS mark ensures purity in carat and fitness as well as the unit's and jeweler's identification mark.



SOVEREIGN GOLD BOND SCHEME

- SGBs are government securities denominated in grams of gold and are substitutes for holding physical gold

—SOMEONE FAMOUS

Mandatory hallmarking of Gold Jewellery and Artefacts
GST reduction from 18% to 3% (Union Budget 2019-20)
GJEPIC's initiatives such as Common Facility Centres (CFCs) and the India Diamond Trading Centre (IDTC) to ensure a level playing field for small manufacturers and enterprises
100% FDI allowed
Setting up of SEZs in 4 states- Maharashtra, West bengal, Rajasthan, Andhra Pradesh
Value limits of personal carriage of G&J products for overseas exhibitions increased to US\$ 5 m

PLANT AND MACHINERY

BASIC/LIGHT EQUIPMENT

Flat Nose Pliers

Round Nose Pliers

Nylon Tipped Pliers

Wire Cutters

Flush Cutters

Jeweler's Saw

HEAVY EQUIPMENT

Jewellery Steamer

Engraving Machine

Melting Machine

RAW MATERIAL REQUIRED

Recycled Gold



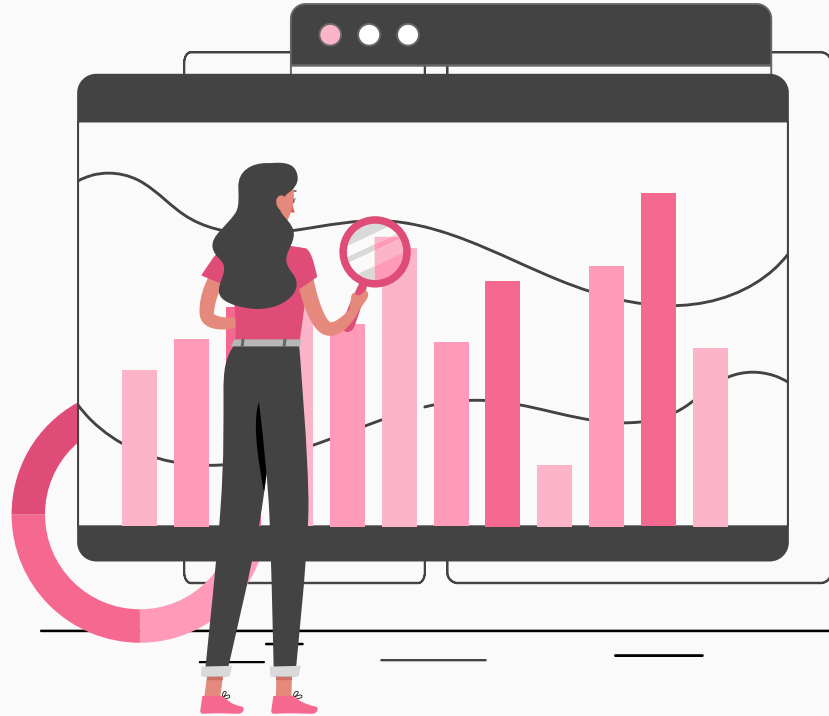
Gold Bars



Rough Diamonds

ROAD AHEAD

- Development of large retailers/brands
- Increasing penetration of organized players provides variety in terms of products and designs
- Online sales are expected to account for 1-2 percent of the fine jewelry segment by 2021-22
- The relaxation of restrictions of gold import is likely to provide a fillip to the industry
- Availability along with the reintroduction of low-cost gold metal loans and likely stabilization of gold prices at lower levels is expected to drive volume growth for jewelers over short to medium term
- Not yet been able to leverage the benefit of the e-commerce boom due to various policy related hurdles- Government intervention required to facilitate ease of doing business and reducing cost of operations





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COLLEGES, INSTITUTES, COUNCILS

Colleges and Institutes

Indian Institute of Gems and Jewellery

National Institute of Jewellery

NIFT Mumbai

Indian Diamond Institute Surat Jewellery

Design & Training Institute The

Gemmological Institute of India

Councils

Gems and Jewellery Export Promotion Council Gems

and Jewellery Skills Council India Gems and

Jewellery Domestic Council



THANKS

