

FESTIVE SEASON 2025

PROMISE OF SPARKLE



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FESTIVE SEASON 2025

Indian jewellery trade and industry expectations & trends

Market Sentiment: Cautiously optimistic despite price pressures

JewelBuzz has its finger firmly on the pulse of India's glittering jewellery trade. From Ahmedabad to Agartala and Jammu to Kochi, we caught up with retailers, trade body reps, and key stakeholders to decode consumer moods, market trends, and the sparkle this festive season promises to bring.

From retail powerhouses like Kalyan Jewellers, Malabar, PNG Jewellers, Senco, and Joy Alukkas to the industry big leagues — GJEPC, GJC, and IBJA — and even the regional gems like Bhima Jewellers, Bidhan Jewellery Works, and Radha Gobindo Roy Grandson Jewellers, we tapped into the pulse of India's jewellery scene. From metros to mandis, the buzz is real we caught the moods, moves, and market vibes straight from every corner of the country.

The Indian jewellery industry is approaching the 2024-25 festive season with measured optimism, balancing record-high gold prices against resilient consumer demand driven by tradition, emotion, and investment psychology.



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EMOTIONAL & CULTURAL

MARKET & INVESTMENT

KEY SENTIMENT DRIVERS

- **Strong festival and wedding season alignment creating natural purchase momentum**
- **Gold viewed as both cultural necessity and safe-haven investment during uncertain times**
- **Consumer confidence improving post-GST reforms and easing inflation**
- **Panic buying emerging as consumers anticipate further price escalation**
- **Robust pre-bookings and footfall reported across major retailers**

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• IMPACT OF ELEVATED GOLD PRICES

• VALUE SALES

THE GOLD PRICE FACTOR: CHALLENGE TURNED OPPORTUNITY

IMPACT OF ELEVATED GOLD PRICES

55%

- Creating volume pressure while maintaining value sales

- Triggering shift toward lightweight and lower-carat options (18K, 14K)
- Driving 50–55% of sales through old gold exchange programs
- Paradoxically strengthening investment demand for coins and bars
- Encouraging premiumization in platinum segment (up 57% YTD, still more affordable than gold)

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RETAILER RESPONSE

- Expanding product range across price points (₹25,000 to ₹20 lakh+)
- Increased advertising spend to capture demand
- Launch of new showrooms by major chains before Diwali
- Focus on innovative collections balancing tradition with contemporary appeal

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EMERGING CONSUMER PREFERENCES THE NEW JEWELLERY BUYER DEMOGRAPHIC SHIFTS

Millennials and Gen Z

Young Professionals

Traditional Buyers

Affluent Segments

Gravitating toward 'studded, gemstone, and fusion designs.

Preferring lightweight, everyday wear pieces.

Beginning to explore diamond jewellery

Maintaining purchase levels despite price increases.

- Millennials and Gen Z: Gravitating toward studded, gemstone, and fusion designs
- Young professionals: Preferring lightweight, everyday wear pieces
- Traditional buyers in Tier 2/3 cities Beginning to explore diamond jewellery
- Affluent segments: Maintaining purchase levels despite price increases

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PRODUCT CATEGORY TRENDS

- **Lightweight jewellery: Strong bookings across all demographics**
- **Daily wear pieces: Growing preference over purely occasional jewellery**
- **Handcrafted and bespoke: Premium segment seeking artisanal value**
- **Fusion temple jewellery: Blending traditional motifs with modern aesthetics**
- **Bridal collections: Sustained demand with weddings driving 60%+ of market**

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THE ALTERNATIVE METALS REVOLUTION

SILVER'S MOMENT

- Significant spike in demand as affordable gold alternative
 - Corporate gifting orders increasing substantially
 - Investment demand for coins and bars showing healthy uptake
 - Contemporary designs attracting younger consumers
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PLATINUM'S PREMIUM POSITIONING

- 57% price appreciation YTD creating value perception vs. gold
- 95% purity and rarity appealing to aspirational buyers
- Natural whiteness enhancing diamond brilliance
- Positioned as "modern heirloom" for younger audiences

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NATURAL VS. LAB-GROWN DIAMONDS PARALLEL GROWTH STORIES NATURAL DIAMONDS

- Projected 18–20% growth in top cities
 - Sub-₹2 lakh category emerging as sweet spot for gifting and everyday wear
 - Traditional gold buyers in smaller cities beginning exploration
 - Positioned as "everyday expressions of love" beyond pure luxury
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LAB-GROWN DIAMONDS (LGD)

- **Exceptional traction among conscious luxury seekers**
- **Appeal based on authenticity, innovation, and responsible sourcing**
- **Strong performance in lightweight, versatile designs and solitaires**
- **One retailer reporting expected 40% festive uplift**
- **Attracting self-purchase and individual expression segments**

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STRATEGIC INDUSTRY RESPONSES INVENTORY AND INFRASTRUCTURE

- Scaled-up inventory levels anticipating surge demand
- Expanded retail touchpoints and new showroom launches
- Fresh collections timed for festive season
- Enhanced omnichannel presence



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MARKETING INTENSIFICATION

- Campaigns across digital screens, hoardings, and in-store events
- Increased advertising visibility to capture consideration
- Specialized collections (Elements of Nature, Aham for men, Infinity Diamond™)
- Focus on storytelling around craftsmanship and meaning

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Daily Elegance \$100-500
Timeless Jewelry \$500-10K
Luxury Jewellery \$10K-50K+
Haute Joaillerie 50K+

PRICE POINT DIVERSIFICATION

- Entry-level: ₹25,000-₹50,000 for young buyers
- Mid-range: ₹50,000-₹5 lakh for festive/occasion wear
- Premium: ₹5 lakh-₹20 lakh+ for weddings
- Flexible options through lower karatage (18K, 14K, 9K)

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REGIONAL INSIGHTS PAN-INDIA PATTERNS

- **Central India: Strong response to purity, design, and trust messaging**
- **Eastern markets (Cuttack, Kolkata): Robust bridal and daily wear demand**
- **Tier 1 cities: Double-digit growth projections**
- **Tier 2/3 cities: Traditional buyers expanding into new categories**

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THE EMOTION-INVESTMENT DUALITY

A DEFINING CHARACTERISTIC OF THIS FESTIVE SEASON IS THE DUAL MOTIVATION DRIVING PURCHASES

A) Emotional drivers:

- Diwali's cultural and religious significance
- Family celebration and togetherness
- Gifting as relationship expression
- Personal milestones and self-expression
- Jewellery as storytelling and identity

B) Practical considerations:

- Gold as secure asset and wealth preservation
- Price appreciation creating urgency
- Tradition meeting financial wisdom
- Value consciousness alongside aspiration
- Investment mindset coexisting with aesthetic

FORWARD OUTLOOK: BALANCED GROWTH EXPECTED

Industry projections

- Healthy season anticipated despite volume pressures
- Strong broad-based growth across all categories
- Momentum expected to continue through wedding season
- Retailers expressing confidence in sustained demand

Opportunities identified

- Growing everyday wear and self-purchase segments
- Expanding market for alternative metals
- Younger demographics entering premium categories
- Conscious luxury and sustainability narratives gaining traction

Risk factors being managed

- Price volatility requiring nimble strategy
- Consumer purchasing power constraints
- Competition from alternative investment instruments
- Balancing tradition with evolving preferences

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SPREAD THE BUZZ

The 2024–25 festive season reflects an Indian jewellery industry in evolution rather than disruption. While gold price levels present genuine challenges, they're being offset by diversification strategies, consumer adaptability, and the enduring emotional significance of jewellery in Indian culture.

The industry's resilience lies in its ability to honor tradition while embracing contemporary preferences offering lightweight designs alongside bridal sets, lab-grown options beside natural diamonds, and silver alongside gold and platinum. With strong pre-season indicators and multi-category growth, retailers are positioned for a season that validates both the timelessness of jewellery in Indian celebrations and the industry's capacity for thoughtful innovation.



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