



A DIAMOND IS FOREVER, BUT?

Made in Asia

CONTENTS

1. DIAMOND JEWELRY INDUSTRY BACKGROUND
A SUPPLY DRIVEN INDUSTRY

2. TURNING POINT
TECHNOLOGY

3. GROWING OUT OF CRISIS
CUSTOMER-CENTRIC

4. KEY TAKE AWAY
A LEAN VALUE CHAIN START FROM NEEDS



01

A SUPPLY DRIVEN INDUSTRY

DIAMOND JEWELRY INDUSTRY BACKGROUND



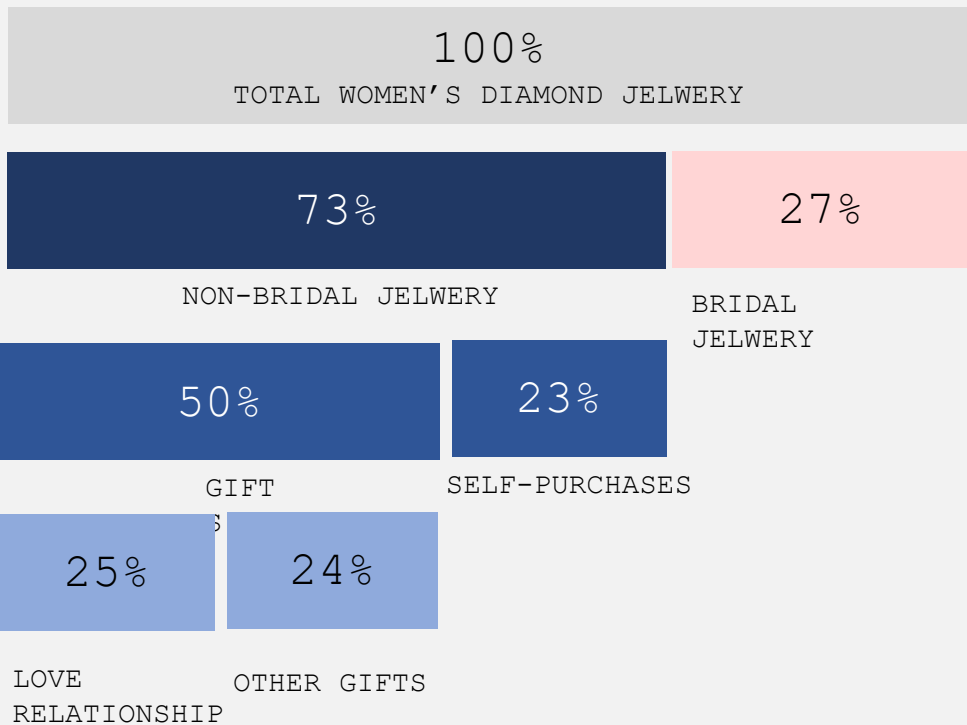
ENTIRE VALUE CHAIN



RETAIL MARKET TREND

CHINA INSIGHT

- ❖ Increasing demand for nonbridal needs of millennial
- ❖ Growth of middle class is expected to reinforce the long-term demand.
- ❖ Online channels are expected to bring additional diamond jewelry sales to regions in China.



*De beers annual report 2017, 2018

GLOBAL (US BN)



US (US BN)



CHINA (US BN)



JAPAN (US BN)



INDIA (US BN)



GULF (US BN)



REST OF WORKLD (US BN)





02

TECHNOLOGY

TURNING POINT

UPSTREAM – BLOCK CHAIN



Blockchain technology is being developed for the diamond pipeline by Tracr™, Everledger, TrustChain and Clara.

A end to end traceability can be provided to consumer, start from the point of production to sales.

WHAT' S NEXT

Smart contract for consignment?

MIDSTREAM – INVENTORY AND LEADTIME

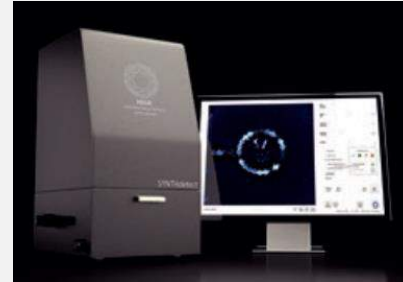


INVENTORY MANAGEMENT



Digital platforms to inform manufacturers and retailers of their polished inventory, allowing “Just-in-time” polished diamond sourcing and improving cash flow.

MAPPING & CUTTING



3D modelling and mapping

Automated cutting and polishing

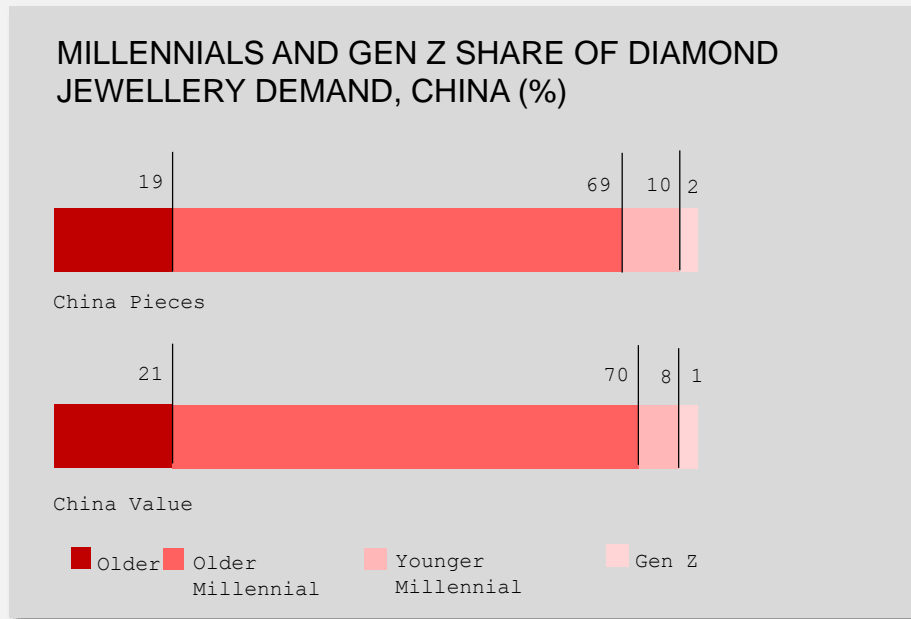
GRADING



Automated grading in diamond

DOWNSTREAM – CONSUMER NEEDS

80% CONSUMED BY
MILLENNIALS IN CHINA



Source: De Beers group-commissioned diamond acquisition study, China 2017, 18-54-year-old women

They are digital natives

They value authenticity,
individuality and self-
expression

They are engaged with society
and social issues



03

CUSTOMER-CENTRIC

GROWING OUT OF CRISIS

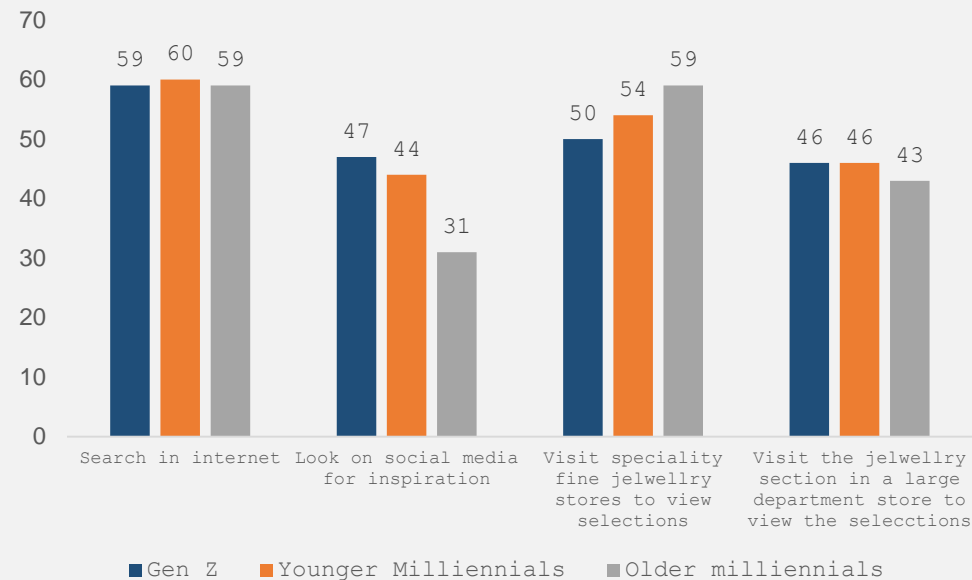


PREDICT AND INFLUENCE THE NEEDS

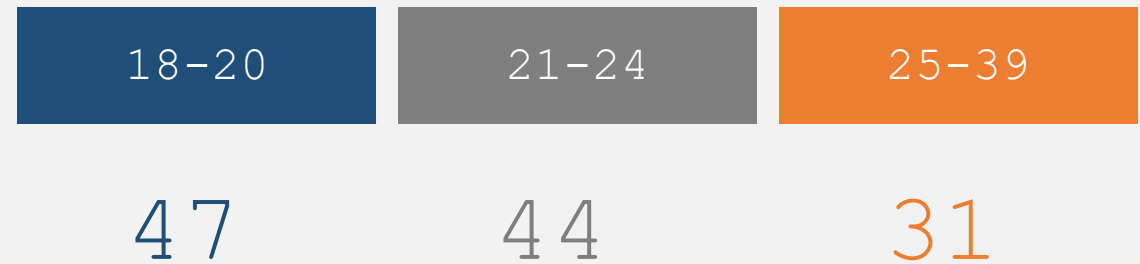
Leverage the online data, we are possible to predict the consumer needs, for instance when the potential engagement moment through the social media, preferred design etc.

Influence the key touch points during the consumer journey, and further to encourage social media shopping.

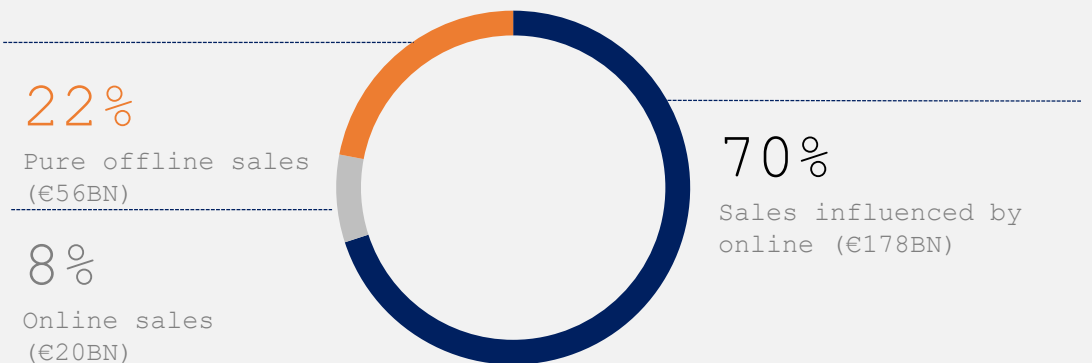
1. METHODS USED FOR RESEARCHING DIAMOND ACQUISITIONS AMONG US CONSUMERS



2. USE OF SOCIAL MEDIA TO FIND INSPIRATION FOR DIAMOND JEWELLERY PURCHASE (% WOMEN IN EACH GROUP)



3. SALES OF PERSONAL LUXURY GOODS





04

KEY TAKE AWAY

A LEAN VALUE CHAIN START FROM THE NEEDS



A black and white photograph of a diamond bracelet resting on a rose. The bracelet is the central focus, featuring a row of large, brilliant-cut diamonds set in a metal band. The rose is in the background, its petals softly blurred, creating a romantic and elegant atmosphere. The lighting highlights the facets of the diamonds and the texture of the rose petals.

THANK YOU
