

Product Directions Update 2015-16

2.0 Edition, April 2015

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The Global Comepetiveness Framework

Global Competitiveness Index

Basic requirements subindex

Pillar 1. Institutions

Pillar 2. Infrastructure

Pillar 3. Macroeconomic environment

Pillar 4. Health and primary education

Efficiency enhancers subindex

Pillar 5. Higher education and training

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Pillar 7. Labor market

efficiency Pillar 8. Financial market

development

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Pillar 9. Technological readiness

Pillar 10. Market size

Innovation and sophistication factors subindex

Pillar 11. Business sophistication

Pillar 12. Innovation

Key for Factor-driven economies

Key for
Efficiency-driven
economies

Key for Innovation-driven economies



The **global economy will accelerate in 2015**, with more than half of global growth coming from the USA and China.

EUROZONE: accelerating gradually, but growth remains subdued and the recovery weak and uneven. Cheap oil, weaker euro, better credit conditions and a committed ECB provide support.

USA: expanding above trend, driven by ultra accommodative monetary policy, consumer and business spending, housing recovery and a boost to consumption from lower oil prices.

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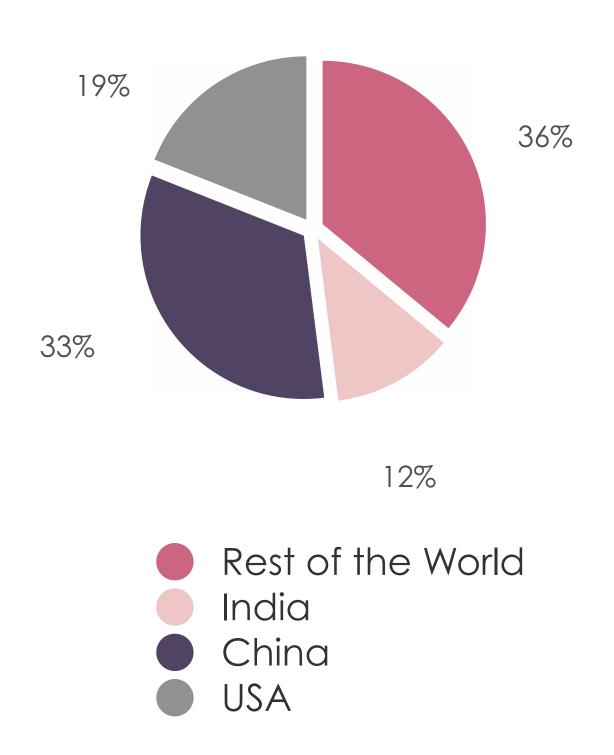
CHINA: gradual slowdown as economic rebalancing progresses. But at 7% growth, the country remains a key driver for global growth.

JAPAN: expanding above trend. Delay of consumption tax to 2017 removes important obstacle growth.



- USA jewellery market will **grow 4% to 8% annually** in the next five years.
- 40% percent of all jewellery by value is bought at specialist jewellery stores.

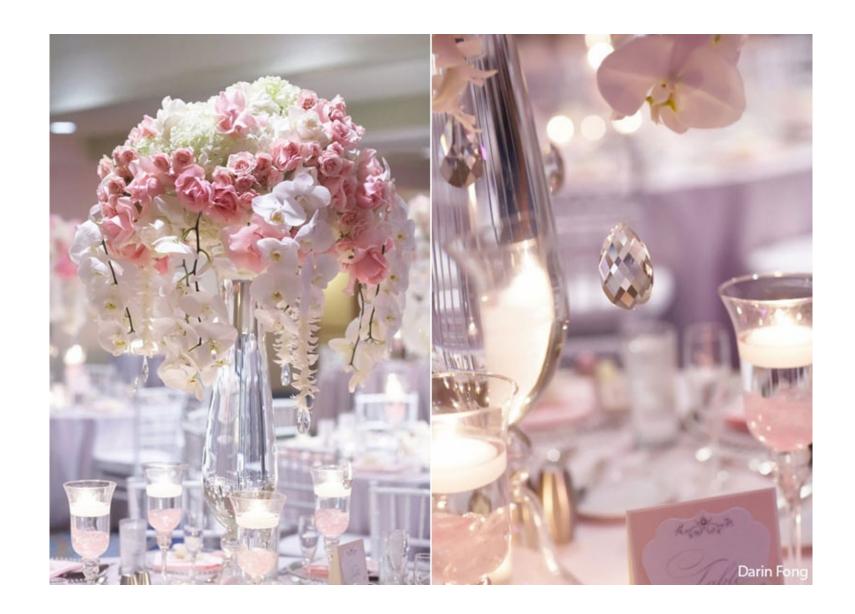
Jewellery Retail Value Size Contribution in 2014





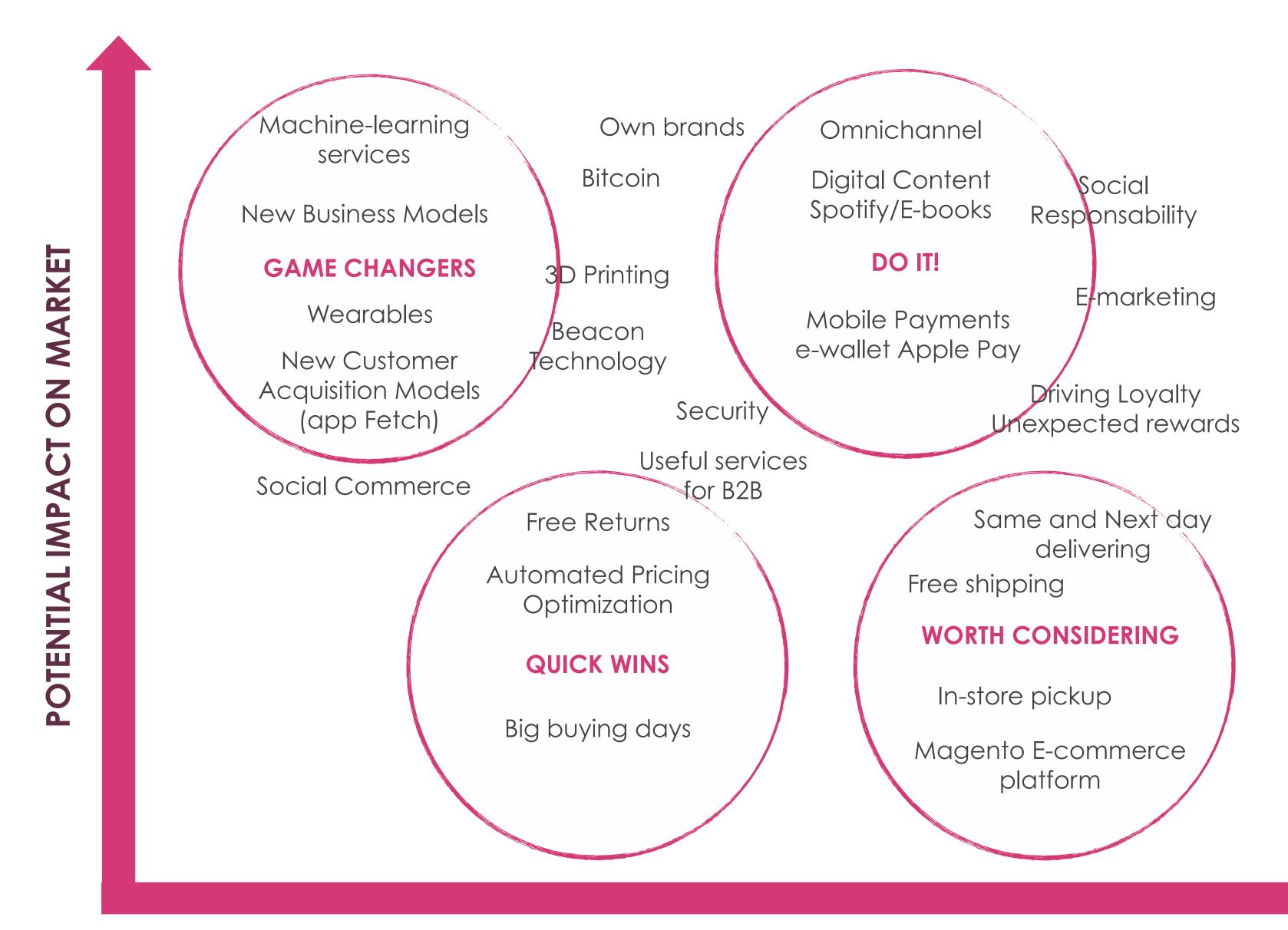






- 30% of all jewellery sales by value is linked to marriage.
- USA diamond market is built on bridal jewellery 85% of diamond jewellery purchases are wedding related.
- Wedding industry has grown to an empire of \$40 billion per year.





MATURITY



THE NOSTALGIC





Innovative pearls extravaganza



Hodel



Yoko London



D.M.L

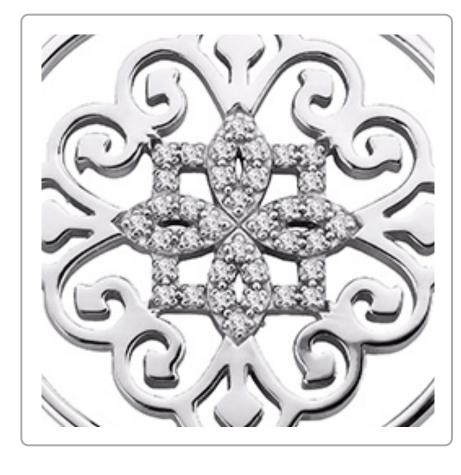


Techniques, Materials, Design Motifs

Cages



Lace motives



Swirly lines



Gemstone insets



Gemstone mix



Twisted silhouette



Cute design motifs



Pearls evolution





Colour Palette













