



THE PLUMB CLUB

INDUSTRY AND MARKET INSIGHTS 2025



The Plumb Club
EDUCATE. INNOVATE. CONNECT.





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1.

EXECUTIVE SUMMARY



INDUSTRY AND MARKET INSIGHTS 2025 | EXECUTIVE SUMMARY

Dear Reader,

Now in its third iteration, The Plumb Club Industry and Market Insights Report continues to serve as a vital resource for the jewelry industry. As part of our ongoing commitment to Educate, Innovate, and Connect, The Plumb Club proudly presents this 2025 edition, combining consumer-facing survey results with industry-supporting research for a well-rounded view of today's market.

This year's initiative begins with insights from our national consumer survey, followed by original research that expands and contextualizes the findings. Together, they offer practical, actionable knowledge for retailers, manufacturers, and brands navigating today's dynamic landscape.

While the global environment continues to shift, the U.S. jewelry market shows strong signs of adaptability and strength. Informed consumers are demanding more than aesthetics — they expect purpose, transparency, and value. The survey findings reflect these evolving expectations.

The detailed research that follows deepens these findings, offering supporting data and expert interpretation to help stakeholders understand the why behind the what.

We hope this report empowers you with the insight needed to make informed decisions, shape compelling narratives, and meet consumers where they are — and where they're headed.

The Plumb Club



INDUSTRY AND MARKET INSIGHTS 2025 | KEY TAKEAWAYS

Takeaway 01	The average, non-bridal jewelry spend has increased to US \$1,664 according to The Plumb Club Survey 2025, 28% more than in 2023.
Takeaway 02	Inflation will influence jewelry buying decisions; many say they will wait for special deals before purchasing.
Takeaway 03	The majority of the respondents are open to owning a lab-grown diamond or gemstones.
Takeaway 04	44% of respondents believe that lab-grown diamonds are identical to natural ones, but 49% prefer natural diamonds.
Takeaway 05	The availability of more product options is becoming a major factor in driving customers to shop online. 50% cite a variety of product as a reason for e-commerce jewelry purchases in 2025 versus 43% in 2023.
Takeaway 06	77% of respondents who made a jewelry purchase via social media did so after seeing an ad for the item on a platform; Facebook was the most popular social media shopping platform, followed by Instagram and TikTok.
Takeaway 07	More customers are coming into brick-and-mortar stores to do research with a jewelry expert: up to 53% from 48%.
Takeaway 08	55% of survey respondents say diversity among store staff is “important” or “very important”.
Takeaway 09	Less than half of respondents would purchase more from a jeweler to achieve VIP status.
Takeaway 10	Demand for gold remains strong despite record-setting prices.

2.

CONSUMER SURVEY 2025

WWAZ	▲	+111.51	▲	-99.31
TVRZ	▲	+92.21	▲	-87.59
TTAW	▲	+87.14	▲	-67.54
CCAD	▲	+131.94	▲	-121.49
HAEW	▲	+74.68	▲	-67.24
JJAS	▲	+94.71	▲	-61.41
RRAP	▲	+77.91	▲	-59.36



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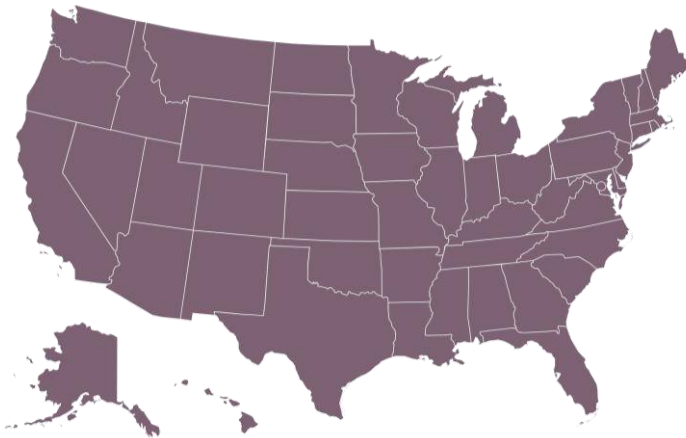
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APPROACH

The study reached 2,121 online respondents in the United States with the goal of understanding how individuals engage with jewelry, including: where/why they shop, impacts of inflation on future purchases, online shopping experiences, importance of responsible business practices, and importance of lab reports, among other topics. Best practice methods included randomizing the order that key elements were displayed so that potential response biases are eliminated

MARKETS SURVEYED



STUDY SCREENERS

- Residing in U.S.
- Ages 25-60
- Attended college
- \$75K+ household income
- Purchase jewelry at least once per year, for special occasions, or plan to do so in next 6 months
- Does not work in market research, advertising, or jewelry industries

KEY ELEMENTS TESTED

- Jewelry purchase influencer(s)
- Jewelry purchase locations/occasions
- Jewelry purchase reason(s)
- Justifications of jewelry price
- Impact of inflation on jewelry purchases
- Importance of lab reports
- Importance of responsible business practices
- Openness to recycled/pre-owned jewelry
- Online purchase experience
- Social media engagement
- Interest in jewelry-buying VIP status



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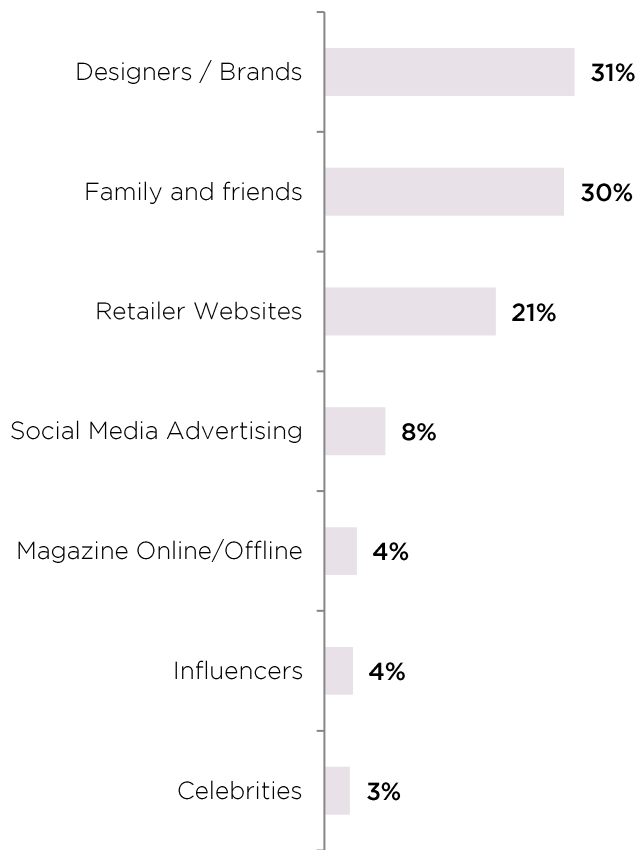
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Respondents most influenced by designer/brands when shopping for jewelry; quality is at the top of importance for jewelry purchases.

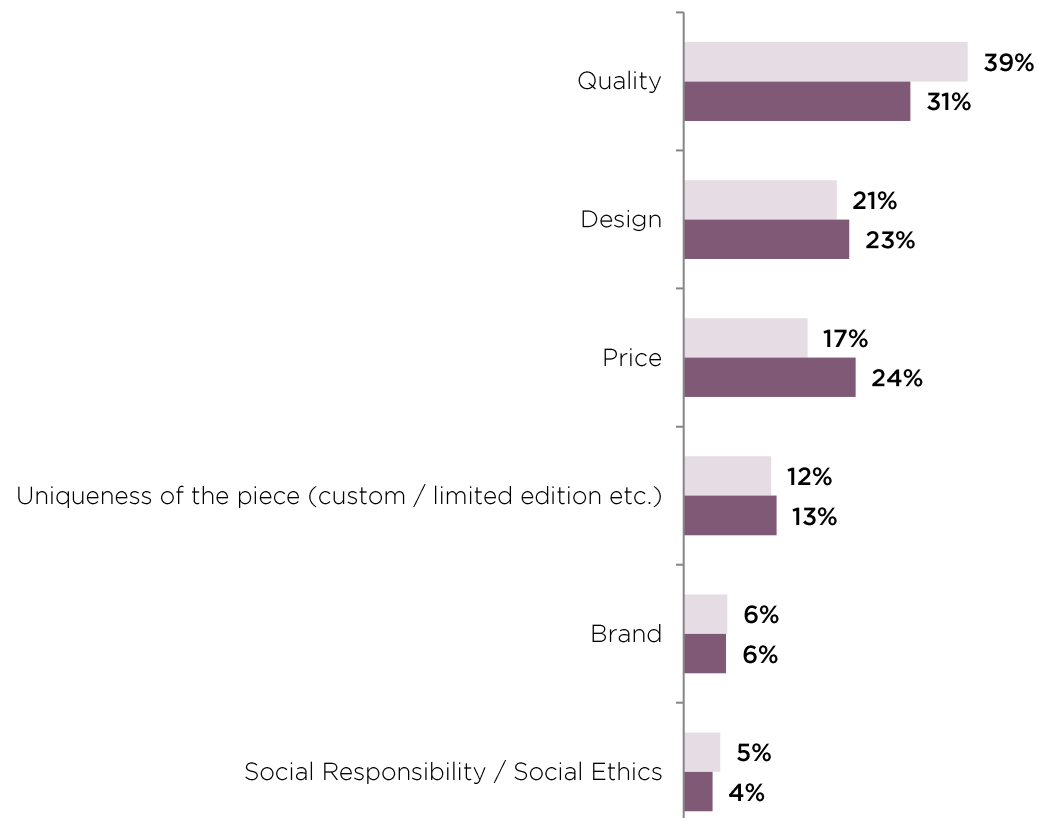
Jewelry Influence

What influences your jewelry purchases the most?



Most Important Jewelry Elements

Please rank in level of importance the elements that matter to you the most while purchasing new jewelry.



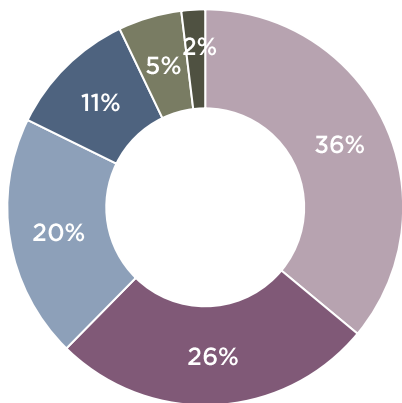
Survey February 2025 Survey February 2023



Respondents are increasing their spending on non-bridal jewelry compared to bridal or engagement pieces, while continuing to shop at their local jewelers.

Non-Bridal Jewelry Purchase Spend

When purchasing non-bridal jewelry (not intended for an engagement or wedding), what's your average amount spent on a single purchase?

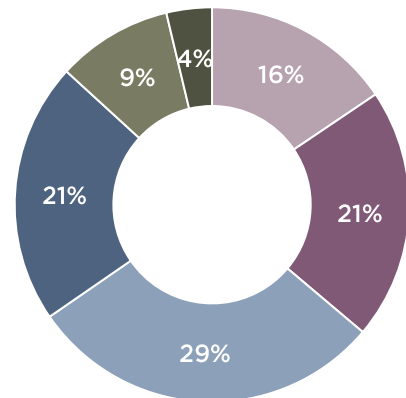


Average: \$1,664
+28% from 2023 survey

- Up to \$500
- \$500 - \$1,000
- \$1,000 - \$2,500
- \$2,500 - \$5,000
- \$5,000 - \$10,000
- Over \$10,000

Bridal/Engagement Jewelry Purchase Spend

When purchasing bridal/engagement jewelry, what's your average amount spent on a single purchase?

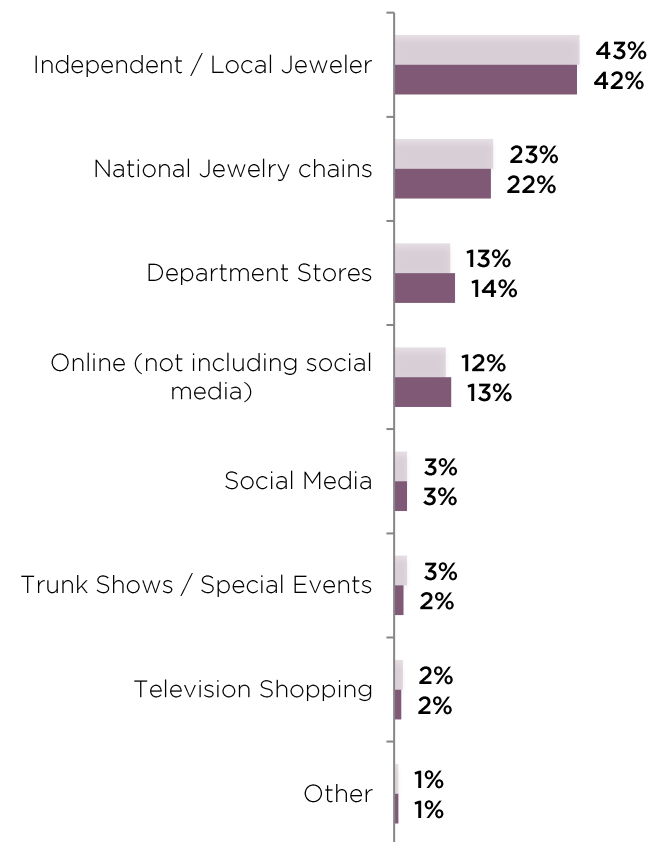


Average: \$5,493
+2% from 2023 survey

- Up to \$1,000
- \$1,000 - \$2,500
- \$2,500 - \$5,000
- \$5,000 - \$10,000
- \$10,000 - \$20,000
- Over \$20,000

Where Jewelry is Purchased

Where do you usually buy jewelry?
Please rank this in order of preference.



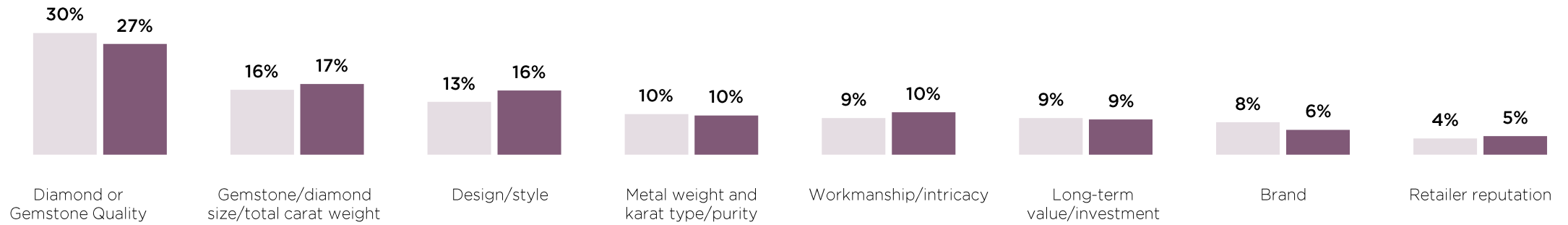
Survey February 2025 Survey February 2023



“Diamond or gemstone quality” remain as the most important element of jewelry that justifies its price, rising +3% from 2023 survey.

Elements Most Justifying Price of Jewelry

Which are the elements of jewelry that you feel most justify the price? Please rank in order of importance.

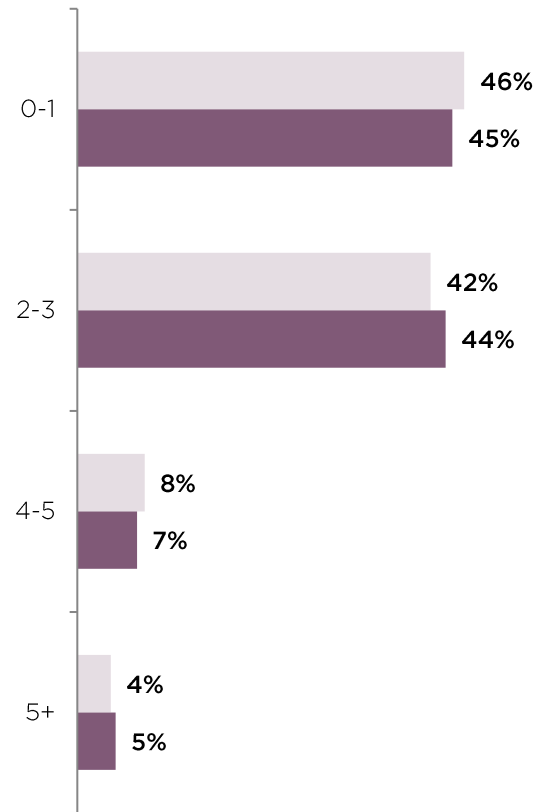


Survey February 2025 Survey February 2023

Almost 90% purchase 3 or fewer jewelry pieces per year; many say they will wait for special deals before purchasing given the rising costs of goods.

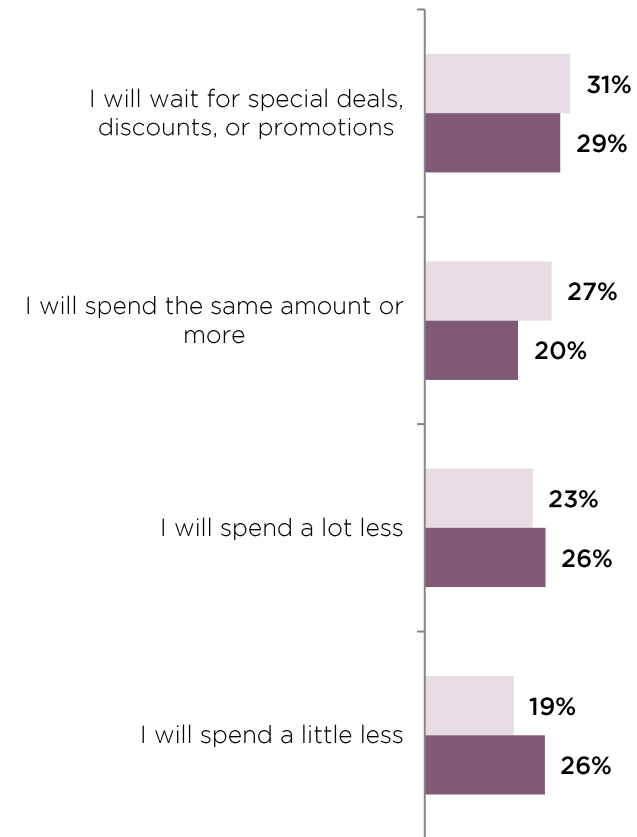
Yearly Jewelry Purchases

How many jewelry pieces do you usually buy in one year, including watches?



Inflation Impact: Coming Year

How will inflation/rising cost of goods impact your jewelry purchases in the coming year?



Survey February 2025 Survey February 2023



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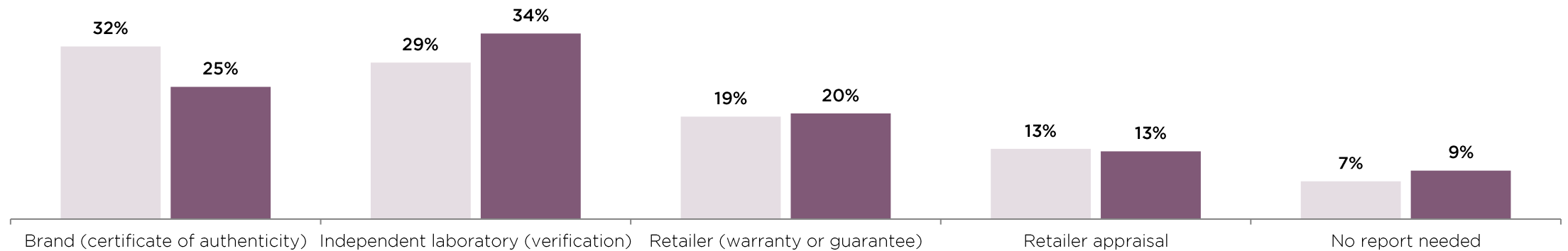
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Certificates of authenticity and laboratory verification remain of prime importance.

Importance of Lab Reports for Fine Jewelry

When purchasing a piece of fine jewelry what type of report or certificate is the most important to you? Rank in order of importance.



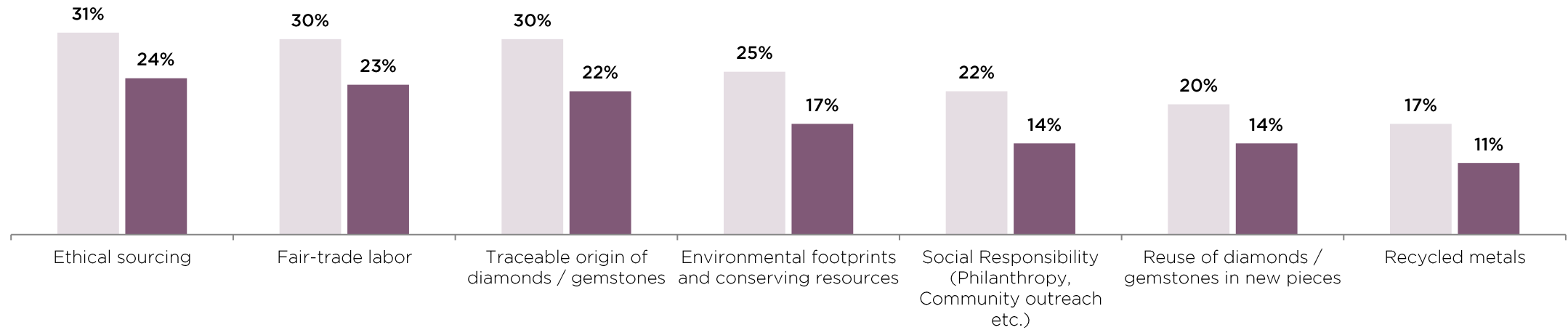
Survey February 2025 Survey February 2023



Responsible business practices importance has increased in all relevant areas.

Business Practice Importance

When considering responsible business practices, please rate how important these aspects are to you.



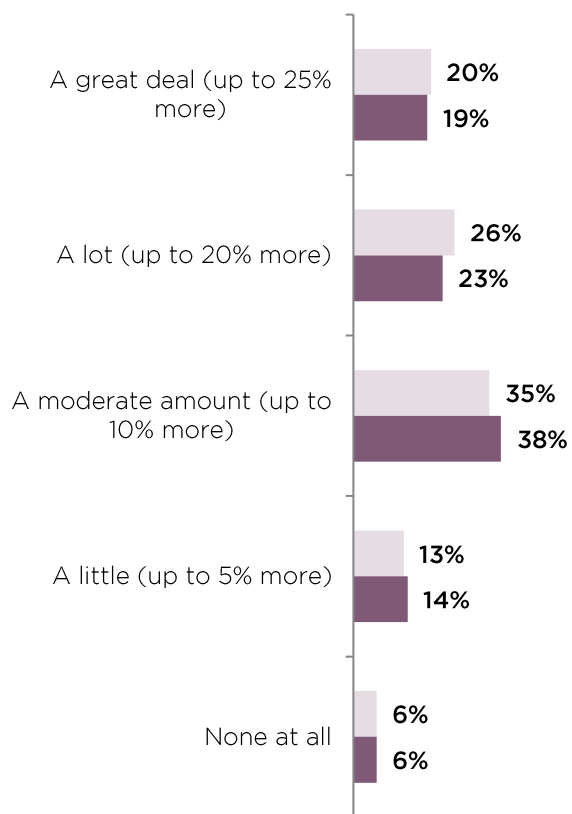
*Please note that Survey February 2025 changed to a 5-point scale from a 10-point scale in February 2023.

Survey February 2025 Survey February 2023

Among those who prioritize the top 3 responsible business practices, more are willing to pay a greater premium compared to the 2023 survey.

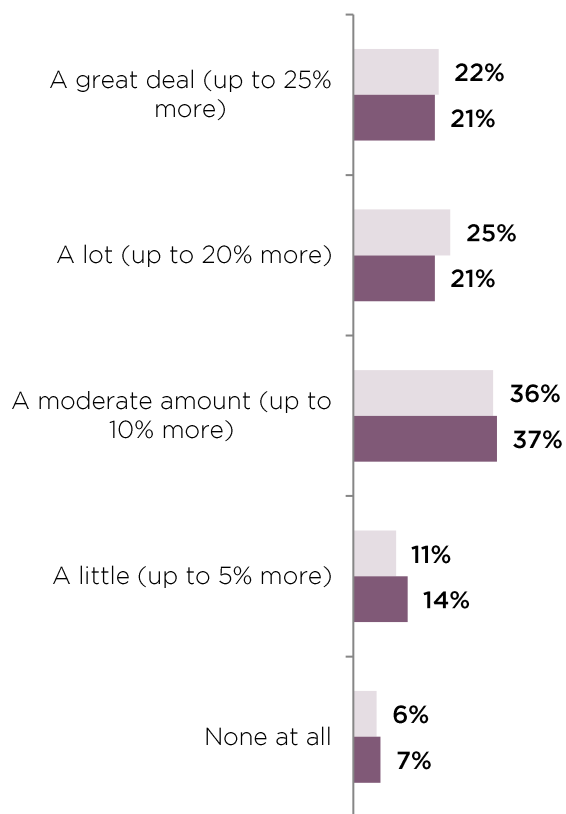
Willingness to Pay Premium for Ethical Sourcing

What premium are you willing to pay to ensure the characteristics that are important to you from the previous question?



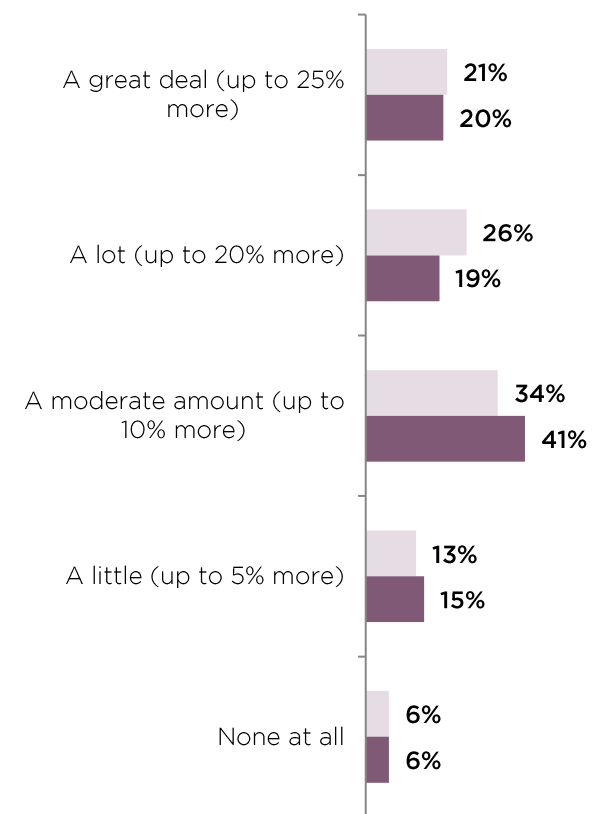
Willingness to Pay Premium for Traceable Origin of Diamonds/Gemstones

What premium are you willing to pay to ensure the characteristics that are important to you from the previous question?



Willingness to Pay Premium for Fair Trade Labor

What premium are you willing to pay to ensure the characteristics that are important to you from the previous question?

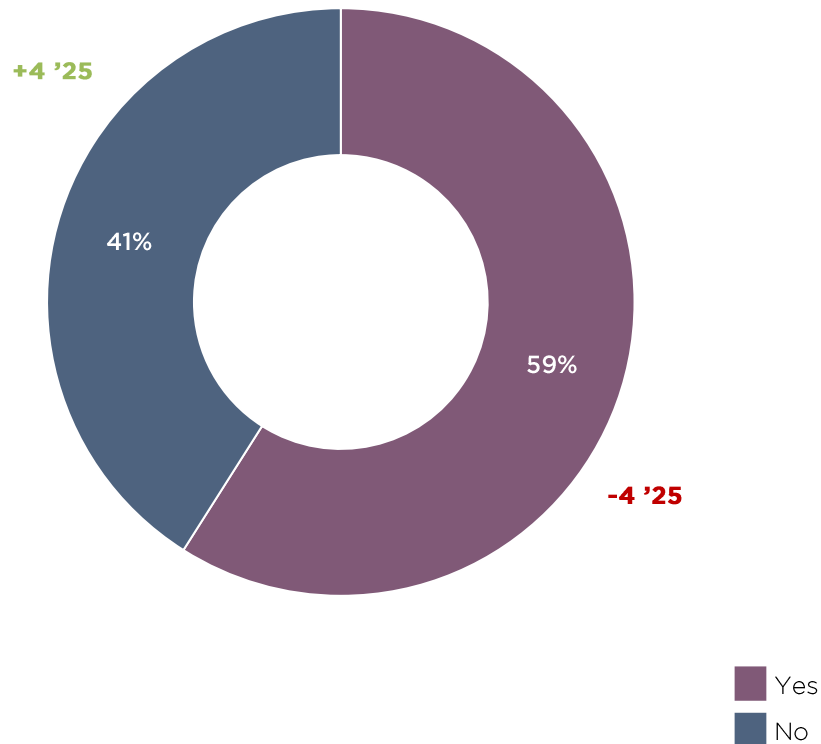


Survey February 2025 Survey February 2023

Fewer respondents are willing to purchase jewelry without verifying the source, and the influence of business practices has grown compared to the 2023 survey.

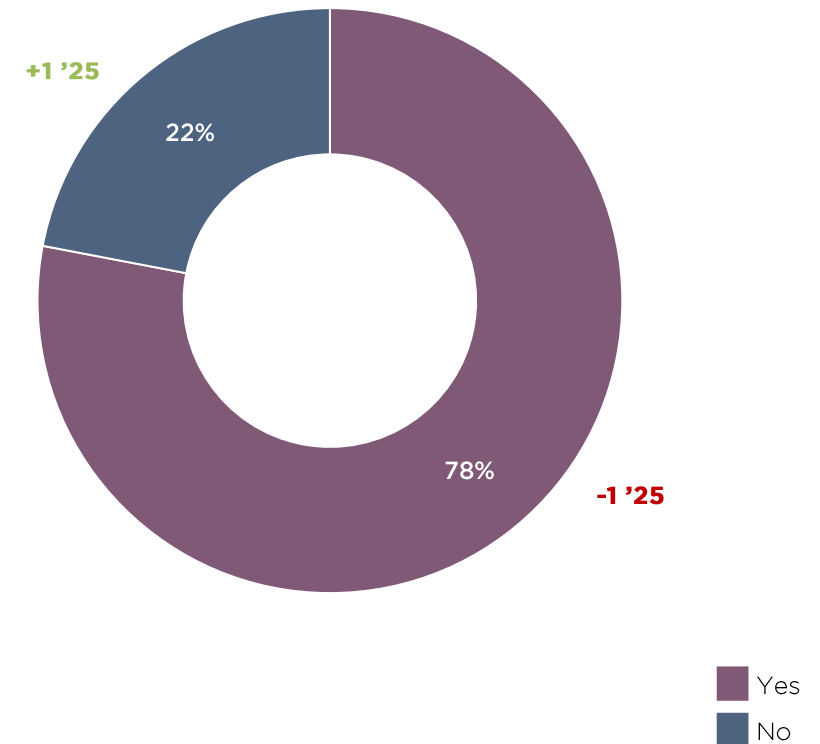
Purchase Likelihood without Sourcing Verification

If you find a piece of jewelry that you really want to purchase, but cannot verify that it has been responsibly sourced, would you still make the purchase?



Influence of Business Practices

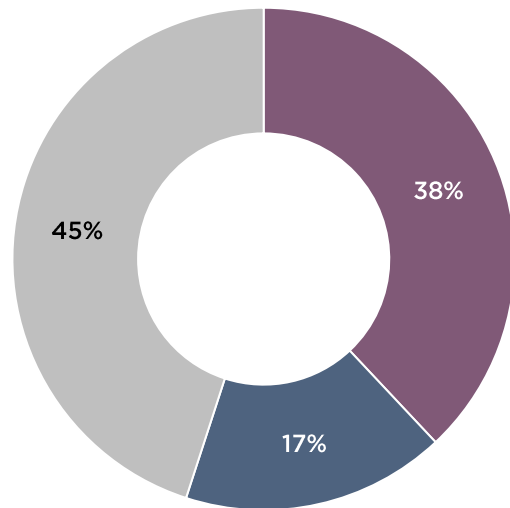
When buying a piece of jewelry, would knowing more about a store or brand's responsible business practices and supply chain influence you to purchase from one store or brand over another?



Respondents are indifferent to purchasing recycled jewelry, while slightly more are willing to buy pre-owned jewelry or watches compared to 2023 survey.

More Likely to Buy Recycled?

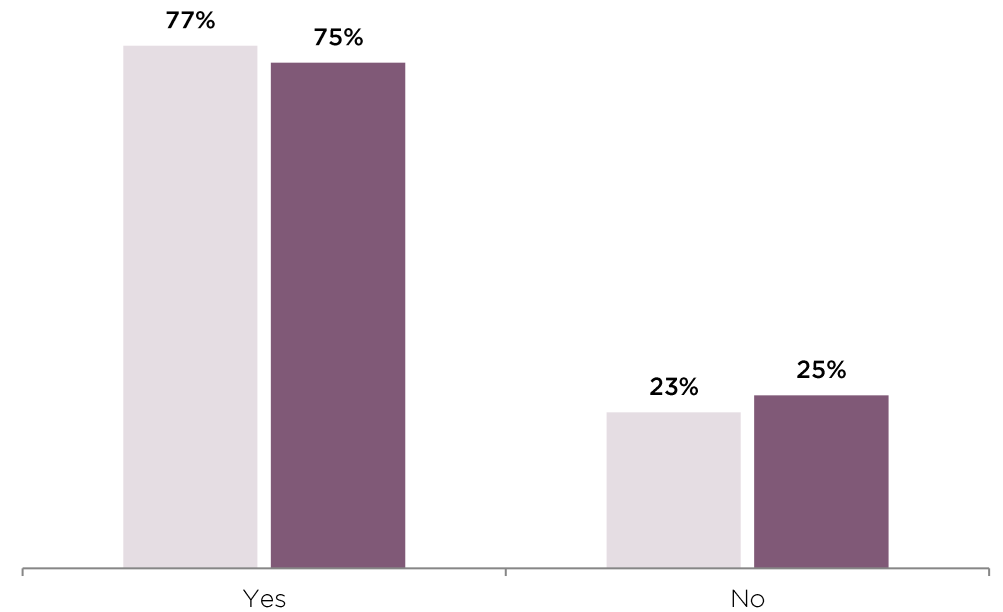
Would you be more likely to buy a piece of jewelry made with recycled metal?



- Yes
- No (I would not buy a piece with recycled metal)
- Indifferent (it would not affect my decision to buy)

Pre-Owned Jewelry Openness

Would you buy a piece of pre-owned jewelry or a pre-owned watch?



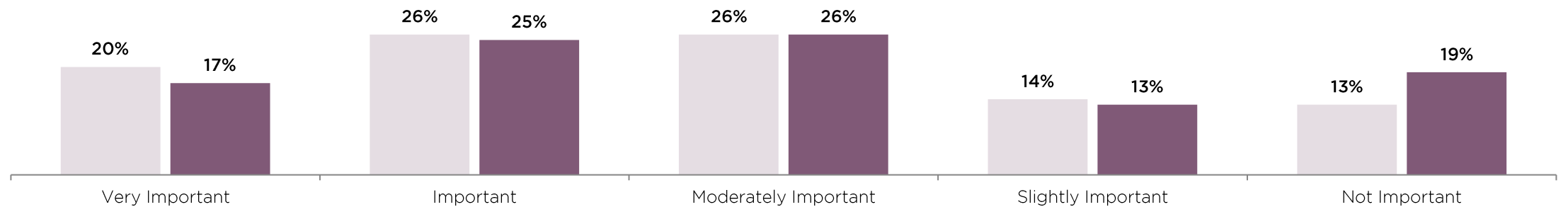
Survey February 2025 Survey February 2023



Slightly more respondents consider the country of origin more important when purchasing jewelry from the 2023 survey.

Importance of Country Origin

How important in the purchase decision is the country of origin (where the piece was made)?

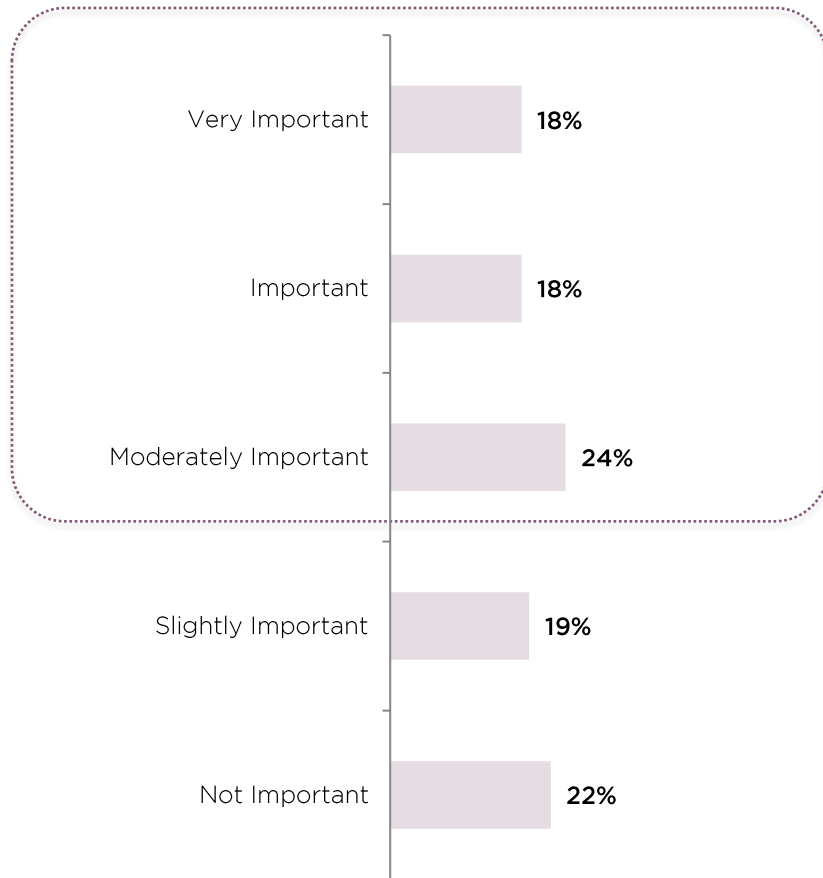


Survey February 2025 Survey February 2023

60% find packaging important in their purchase decision, while 60% also consider recycled packing important.

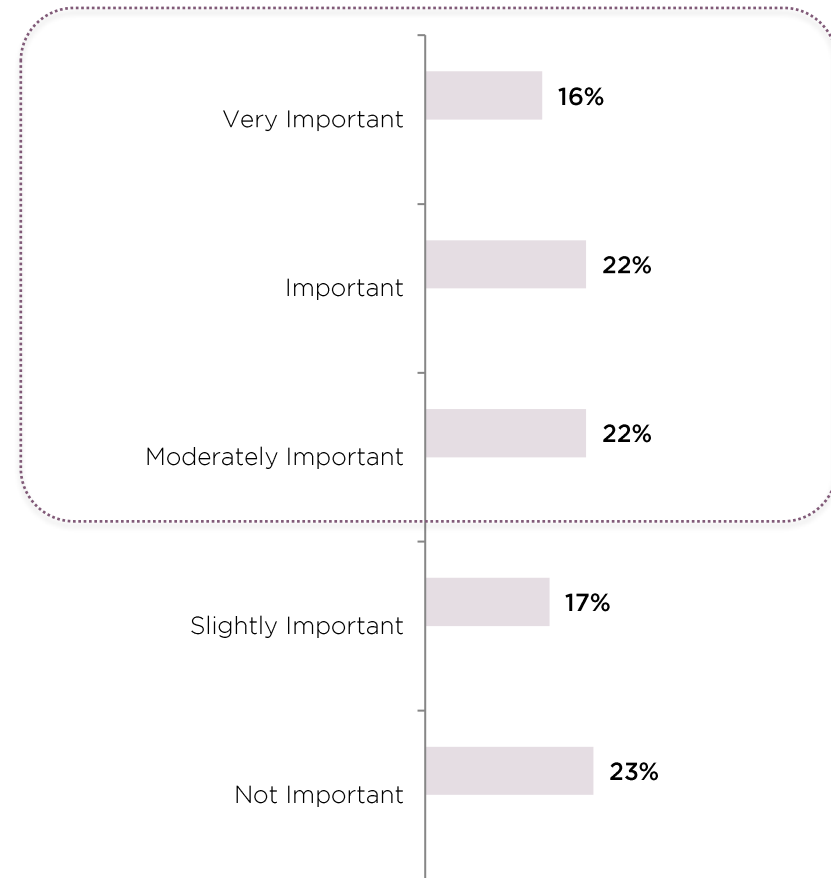
Importance of Packaging

How important is the packaging used by the brand or retailer in the purchase decision?



Importance Recycled/Compostable Packaging

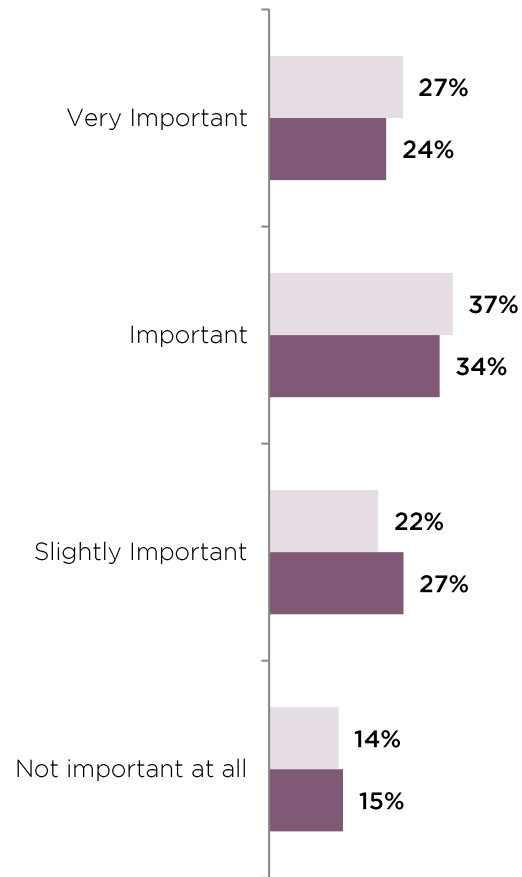
How important is it that the packaging used is recycled, or is compostable or recyclable?



64% value name-brand products in-stores and over 60% prioritize salesperson product and industry expertise, both up from the 2023 survey.

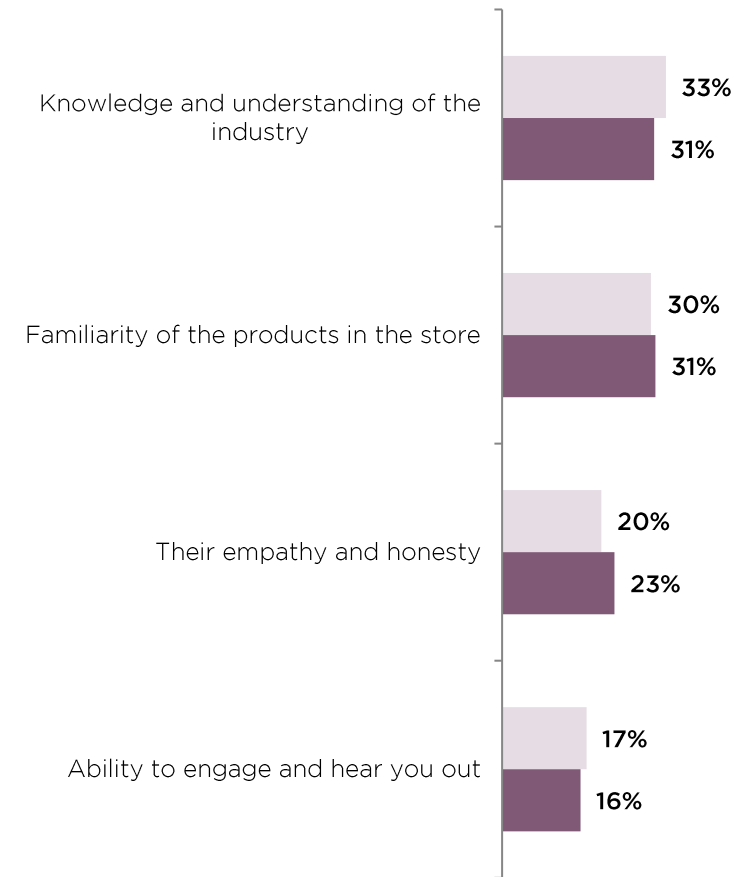
Importance of Carrying Name Brands

How important is it for a retail jewelry store to carry name brands?



Desired Salesperson Qualities

What are qualities you find most valuable in a salesperson?



Survey February 2025 Survey February 2023



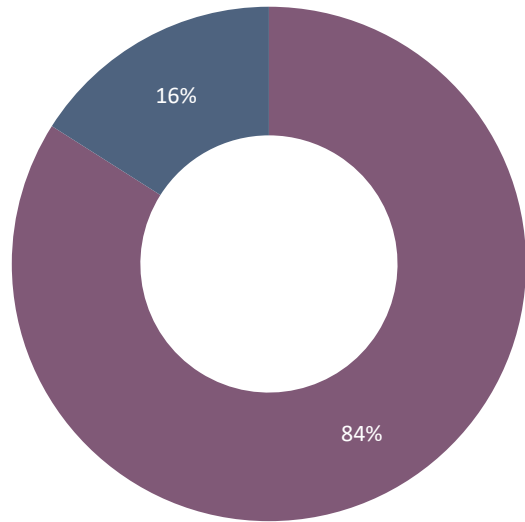
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Awareness of lab-grown diamonds among respondents has increased, along with their understanding of the differences from natural diamonds.

Natural, Lab-Grown Diamond Awareness

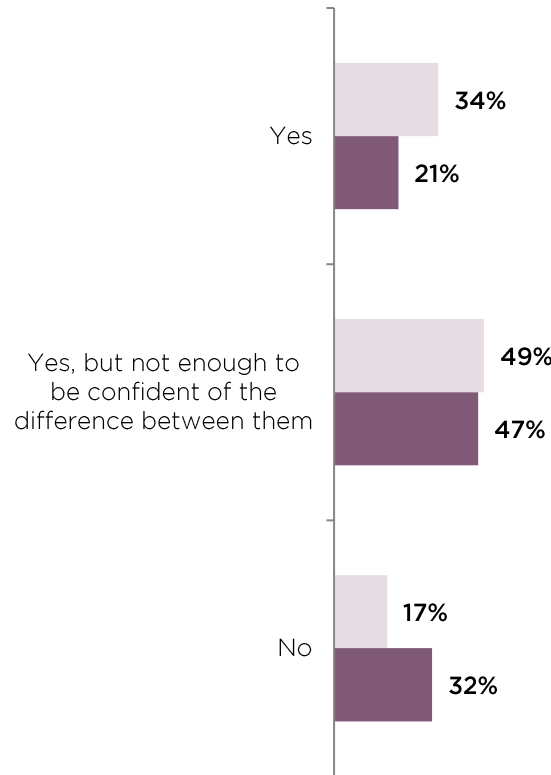
Are you aware of the choice of lab-grown diamonds in fine jewelry?



■ Yes
■ No

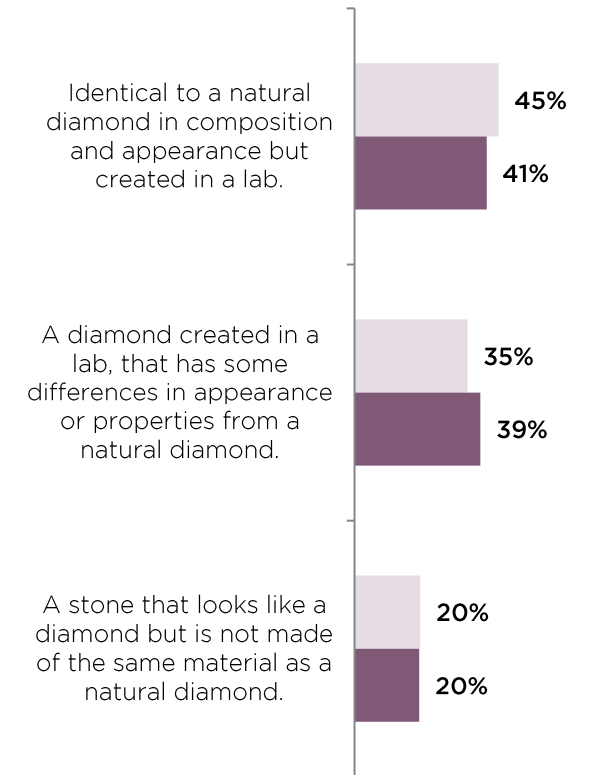
Know Differences: Natural, Lab-Grown

Do you know the differences between Natural Diamonds and Lab-Grown Diamonds?



Lab-Grown Definition

Please select the statement that you think most closely defines a laboratory-grown diamond.

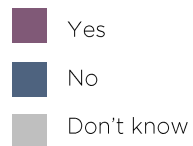
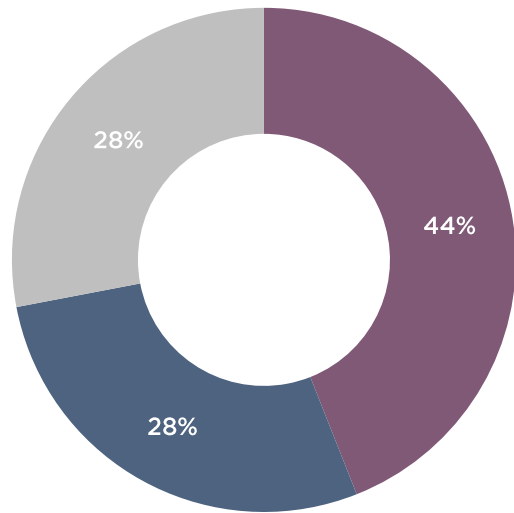


■ Survey February 2025 ■ Survey February 2023

44% of respondents believe that lab-grown diamonds are identical to natural ones, but they prefer natural diamonds.

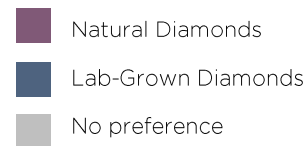
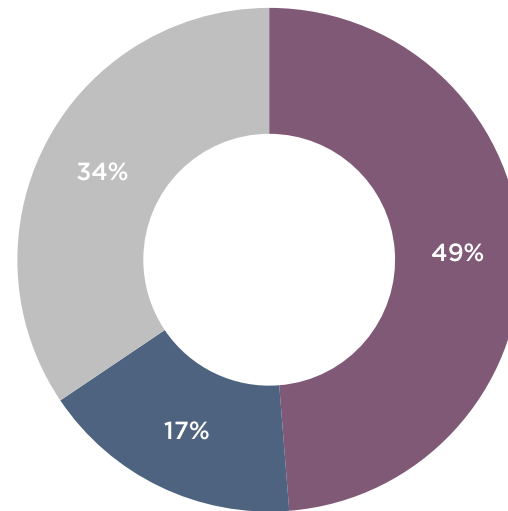
Lab-Grown & Natural Diamonds

Do you believe this statement is true: A lab-grown diamond is identical to its mined counterpart chemically, physically and optically.



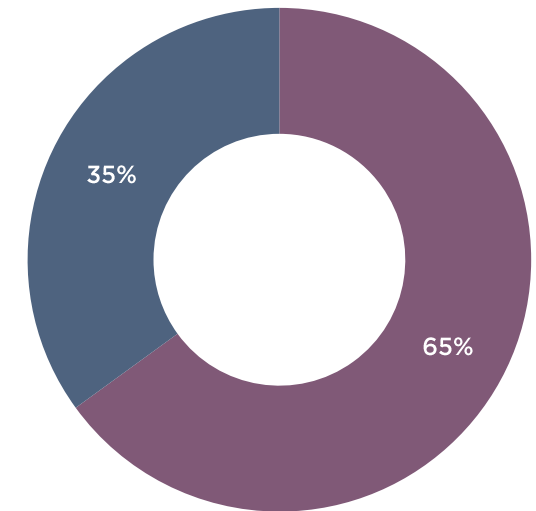
Natural & Lab-Grown Purchase Preference

When comparing two diamonds of the same cut, color, quality and size, which would you prefer to buy?



Lab-Grown Diamonds: Fashion Jewelry

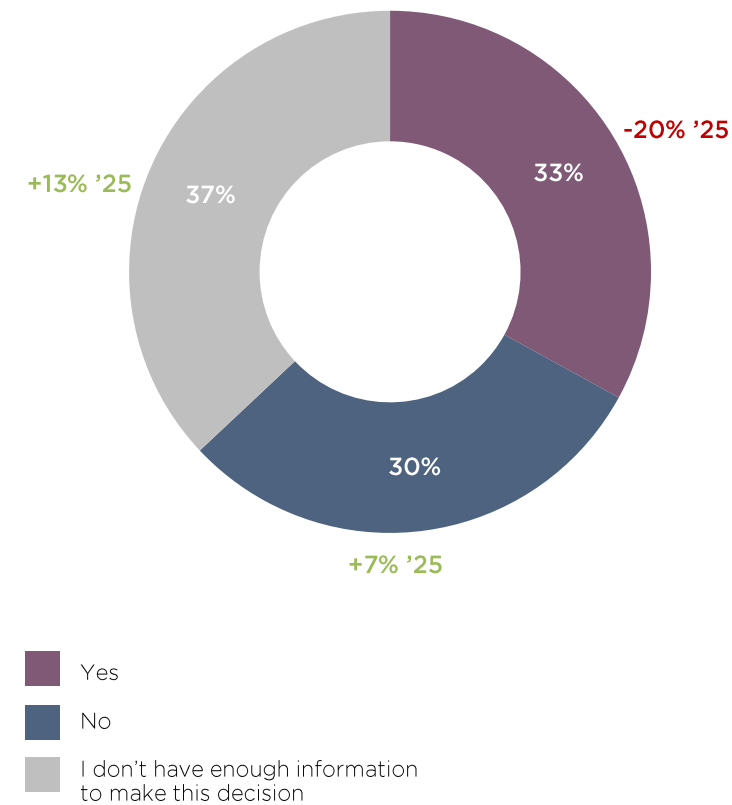
Would you consider buying a piece of fashion jewelry (jewelry other than engagement, anniversary, wedding band) with lab-grown diamonds?



37% of the respondents still do not have enough information to determine preference of a lab-grown diamond engagement ring. Price and quality are determining factors.

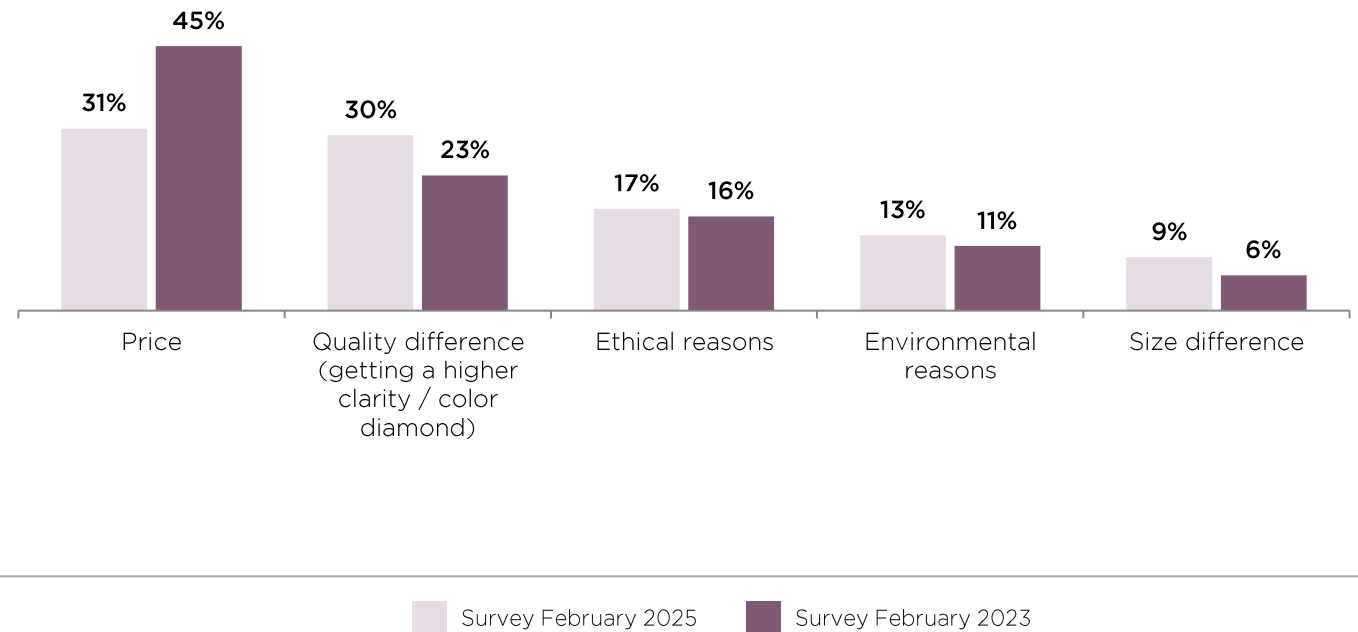
Lab-Grown Engagement Ring

Would you prefer buying a lab-grown diamond engagement ring?



Importance Factors: Lab-Grown Diamonds

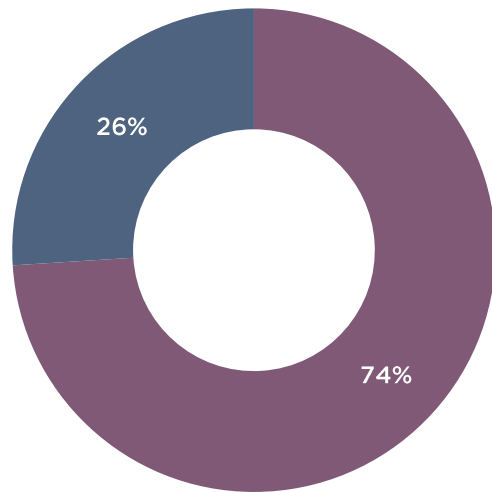
If you were to buy a lab-grown diamond or a lab-grown diamond engagement ring, what would be the determining factor of that purchase? Please rank in order of importance.



The majority of the respondents are open to having a lab-grown diamond or gemstones.

Openness to Lab-Grown Engagement rings

Are you open to receiving/giving a lab-grown engagement ring from your partner?

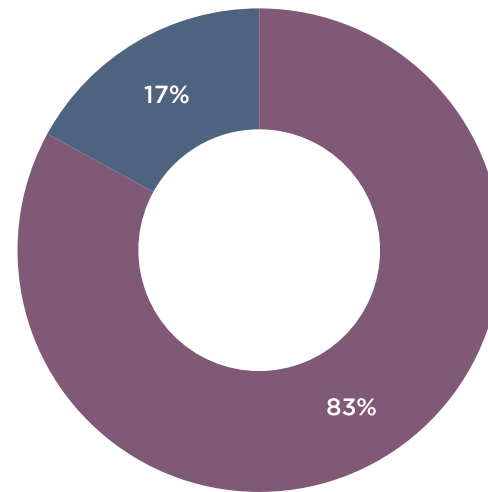


Yes
No

*Added in February '25

Openness to Lab-Grown jewelry

Are you open to receiving a piece of jewelry (other than bridal / engagement) with lab-grown diamonds from your partner?

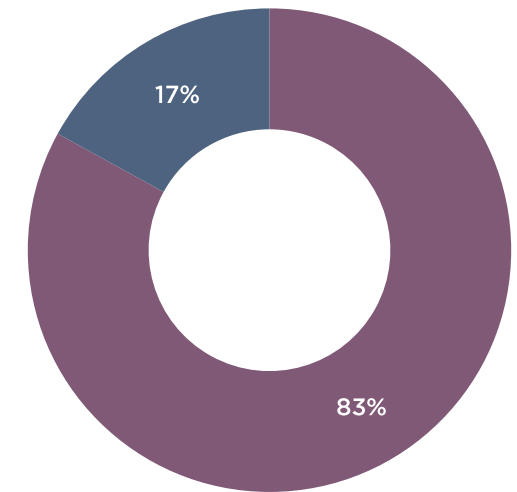


Yes
No

*Added in February '25

Openness to Lab-Grown gemstones

If you learned that lab-grown rubies, emeralds and sapphires are the same chemically, optically, and physically to their mined counterparts, would you be open to buying them?



Yes
No

*Added in February '25



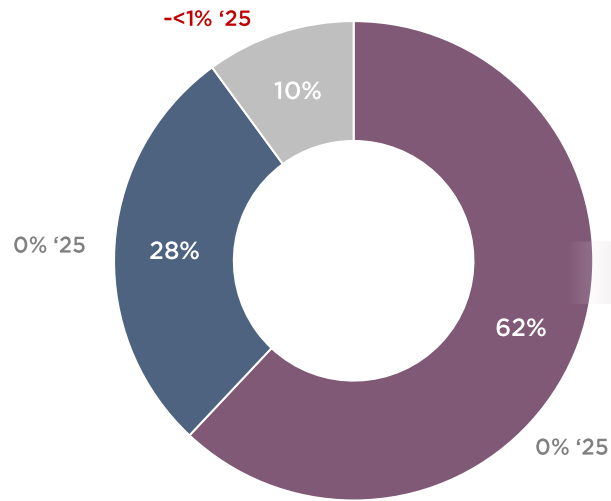
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Convenience and more product options are the key drivers for shopping online. 50% of respondents have purchased watches online.

Jewelry Purchases Made Online

Have you bought jewelry online?



■ Yes
■ No
■ No, but browsing prompted me to visit / purchase from a store

Reasons for Online vs. In-Store

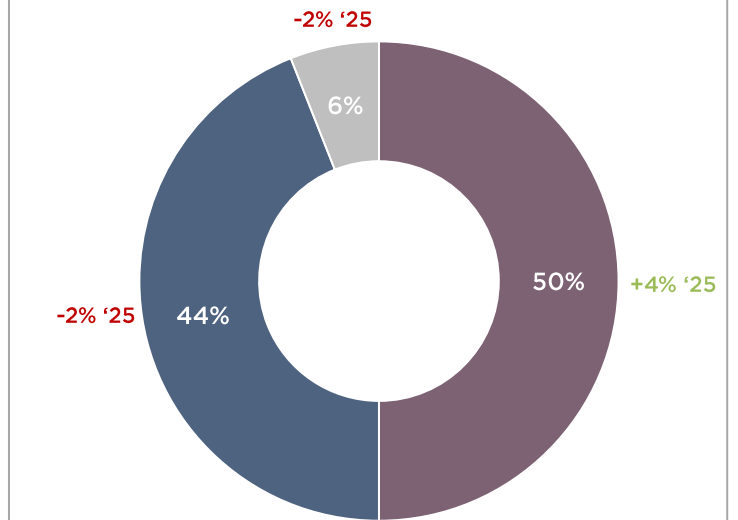
What prompts you to shop online versus in the store?
(Select all that apply)



■ Survey February 2025 ■ Survey February 2023

Watch Purchases Made Online

Have you purchased watches online?

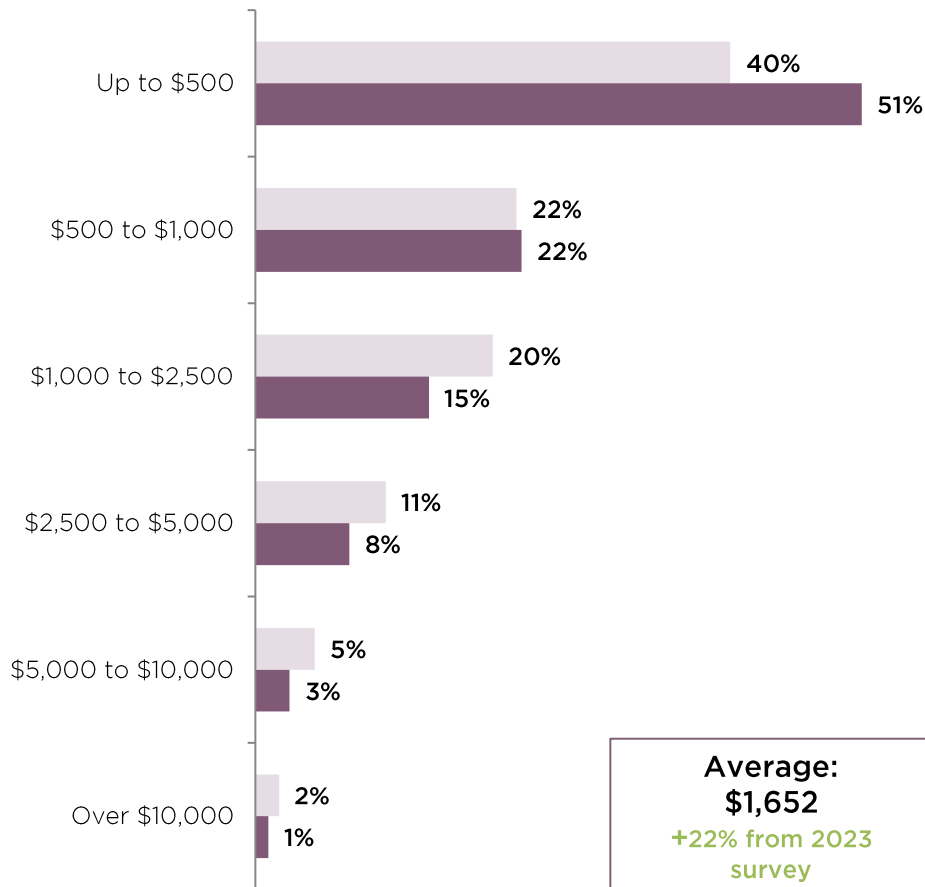


■ Yes
■ No
■ No, but browsing prompted me to visit / purchase from a store

Online spending budgets have increased by 22%, while online shoppers prefer to buy direct from brands or their local jeweler.

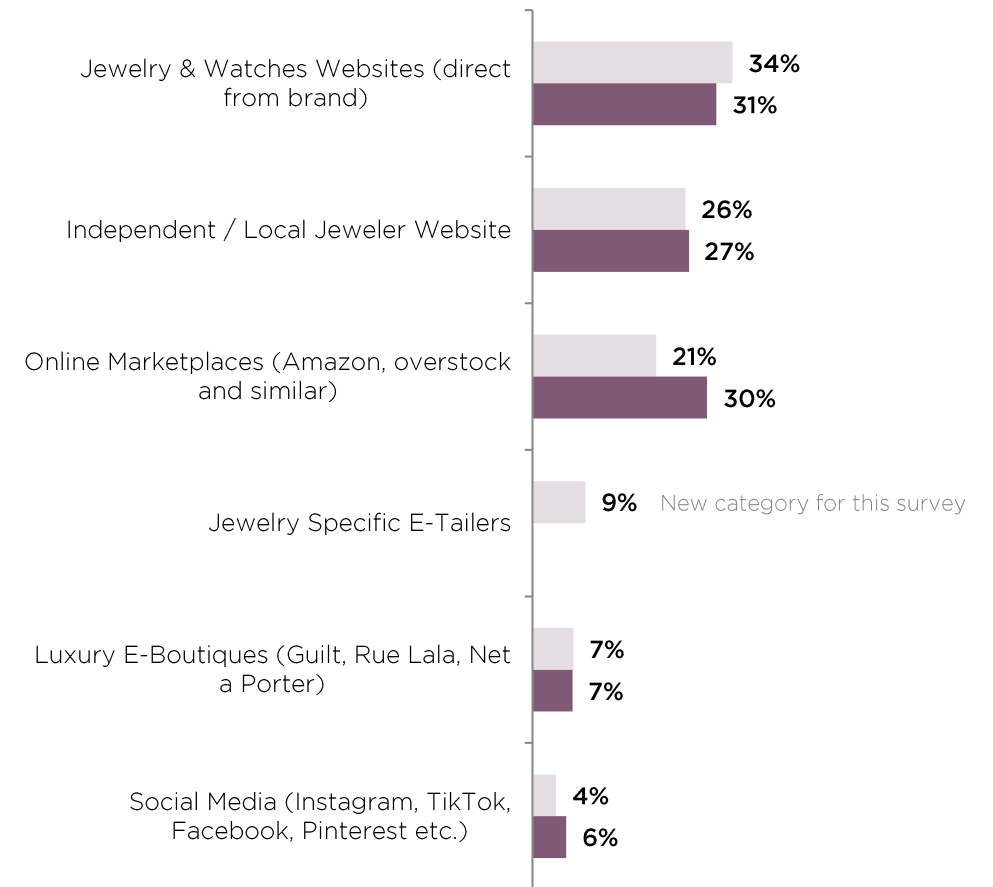
Online Shopping Budget

If you were to shop for jewelry online, what would be your budget?



Online Channel Preferred

If you buy or browse online, which channel is preferred for fine jewelry purchases?

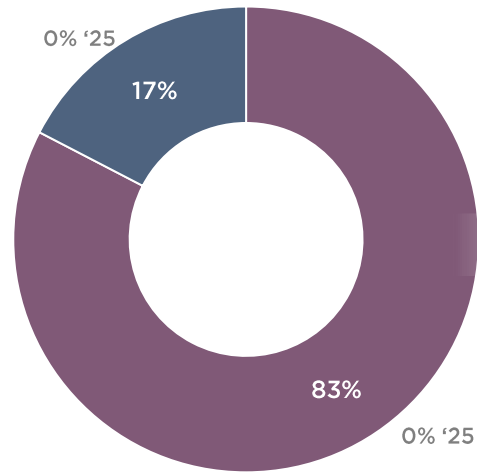


Survey February 2025 Survey February 2023

TikTok usage has increased from the previous wave with slightly more users making purchases through social media.

Social Media Activity

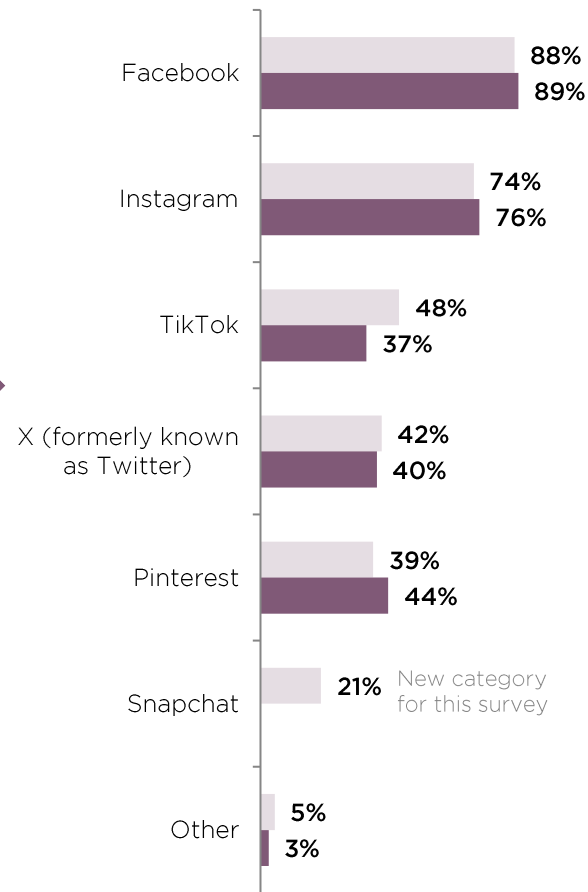
Are you active in social media?



Yes
No

Social Media Platforms

Which platforms are you active on?

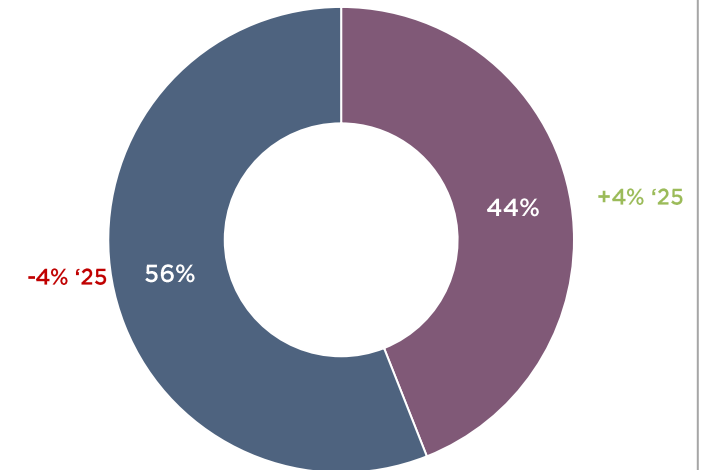


Survey February 2025

Survey February 2023

Purchase made through Social Media

Have you ever made a purchase through social media?

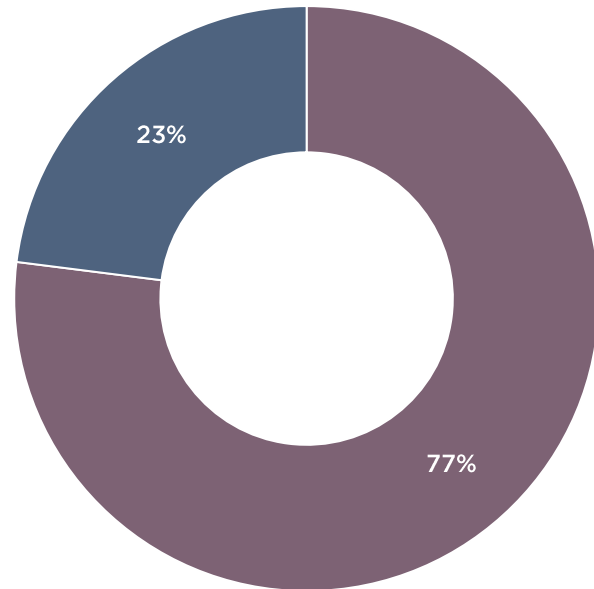


Yes
No

Facebook and Instagram remain preferred platforms for social media purchases with other platforms making significant inroads. Ads still influence purchases.

Social Media Purchase Related to Ad?

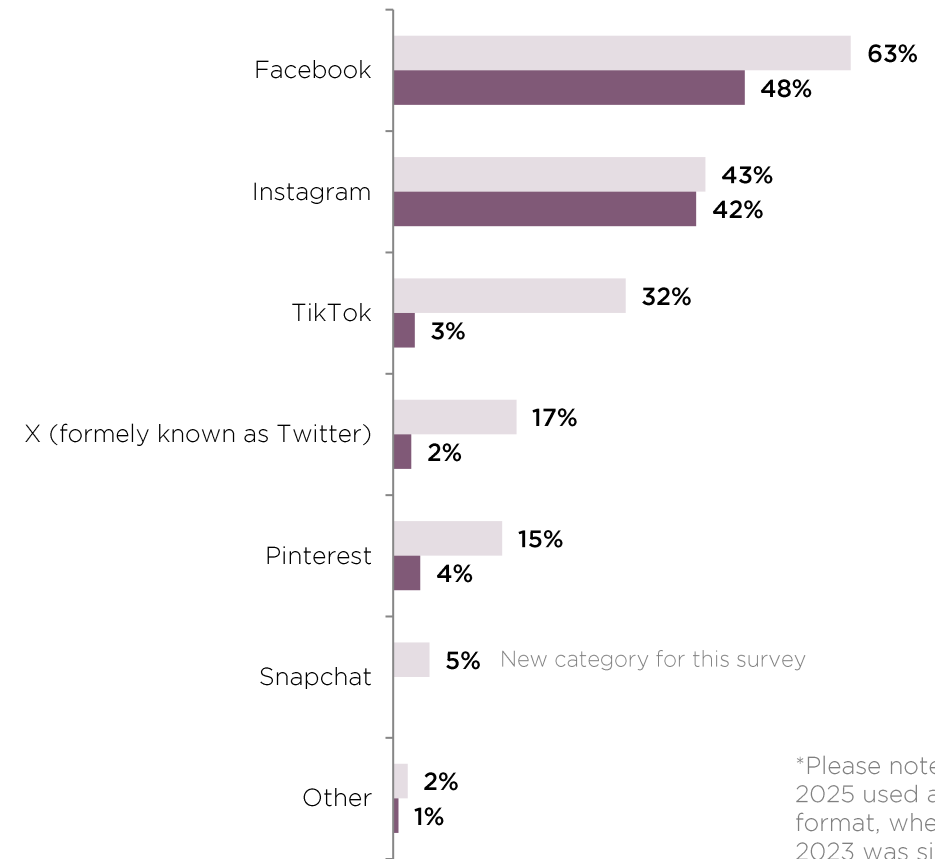
Was your social media purchase related to an ad you saw on the platform?



Yes
No

Preferred Social Media Platform for Purchases

If purchasing through social media, which platform is preferred?



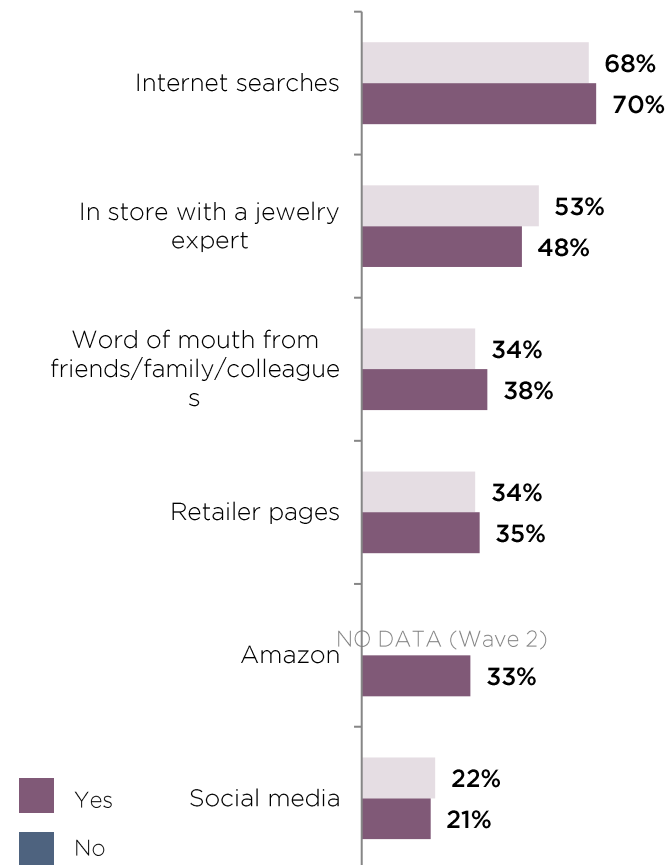
*Please note Survey February 2025 used a multiple-choice format, whereas in February 2023 was single-choice.

Survey February 2025 Survey February 2023

Slightly more respondents are visiting stores with jewelry experts to research purchases, and brands are followed on social media more often than local stores.

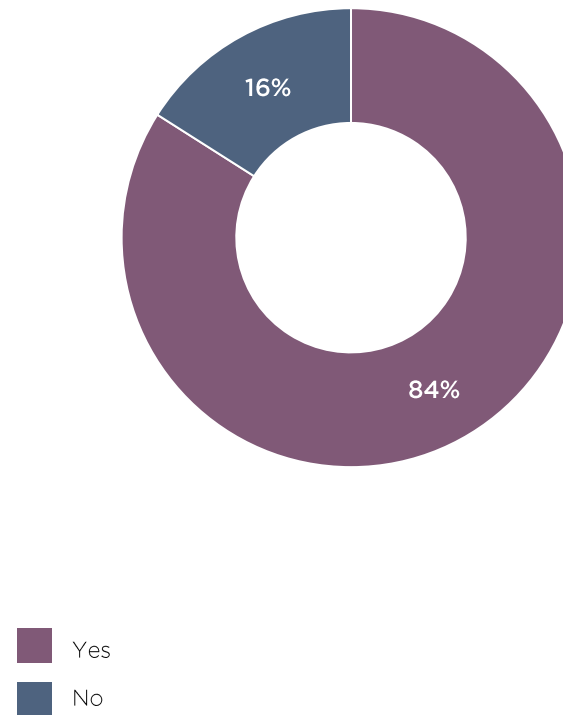
Jewelry Research Locations

Where do you research your jewelry purchases?
(Select all that apply)



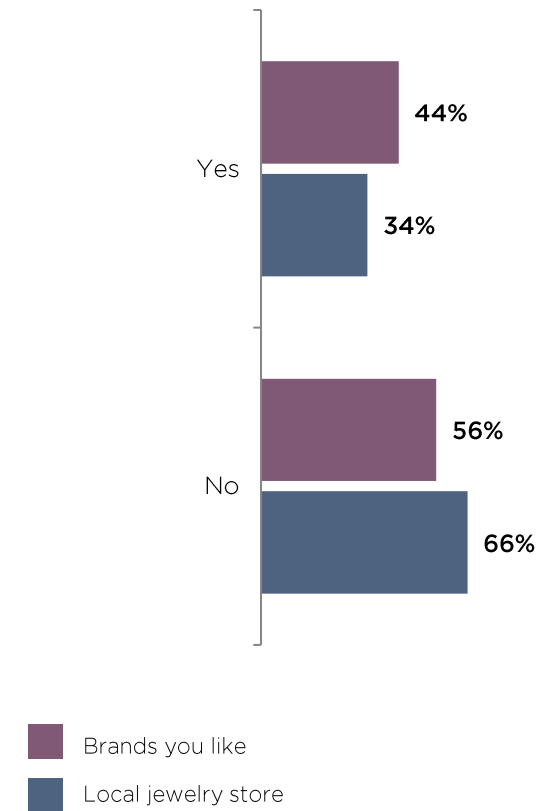
Enough Information Available?

Do you find that there is enough reliable information available about a jewelry purchase to educate yourself?



Social Media Following Behavior

Do you follow the brands you like on social media platforms?
Do you follow your local jewelry store on social media platforms?



Survey February 2025 Survey February 2023



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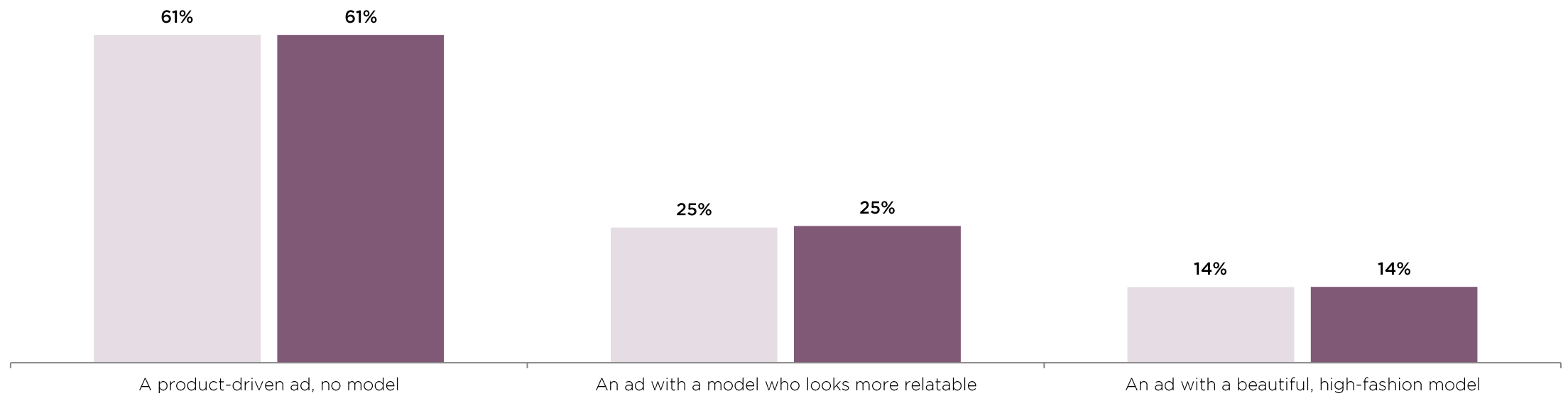
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Product driven ads still have the greatest effect on respondents.

Ad With Greatest Effect

What has the greatest effect on you?



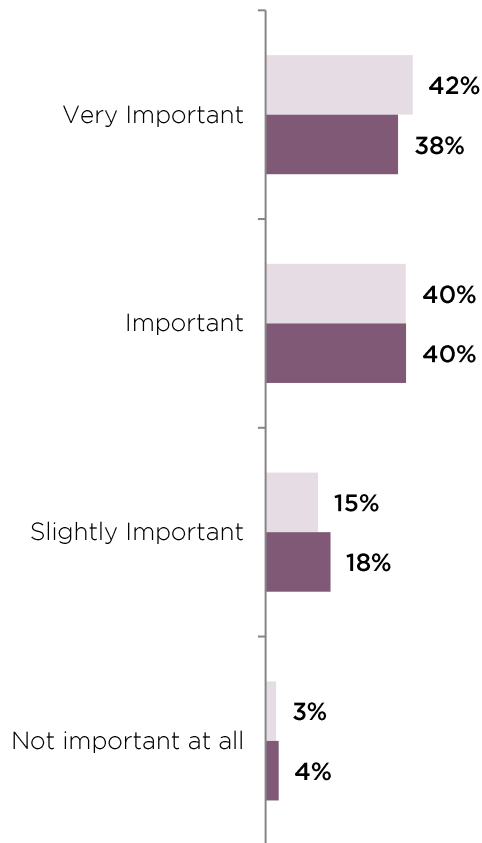
Survey February 2025 Survey February 2023



Respondents are placing a greater importance on the jewelry salesperson credentials, online presence and diversity/inclusivity advertising.

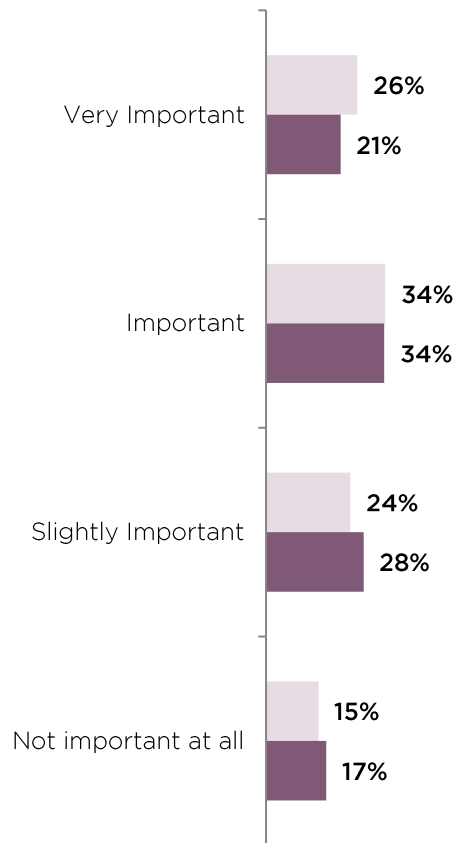
Importance of Credentials

How important is it that your jewelry salesperson has credentials, certificates, or education about diamonds, gemstones, and jewelry?



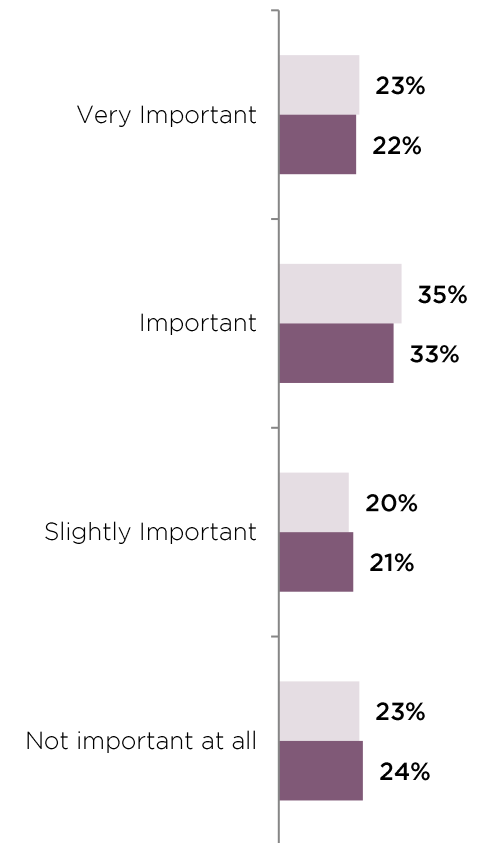
Importance of Online Presence

How important is it that your jewelry retailer maintains a current online presence, such as: updated photography, content and social media profile?



Importance of Diversity/Inclusivity

How important is it that your jewelry retailer shows diversity/inclusivity online and in advertising?



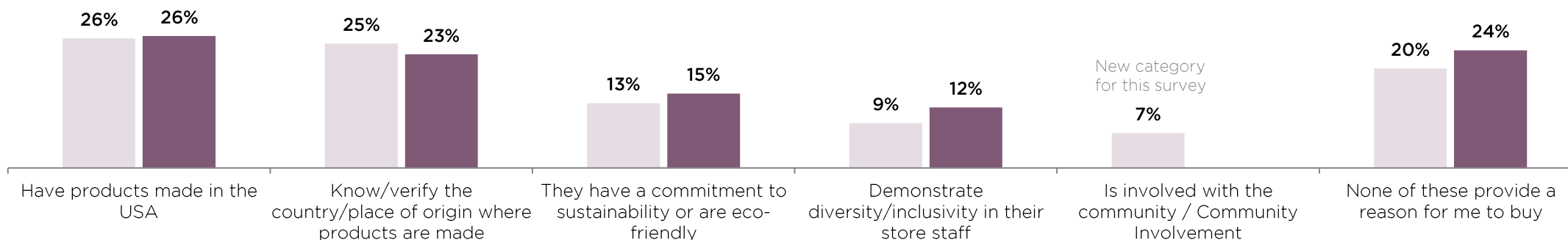
Survey February 2025 Survey February 2023



More respondents still favor U.S.-made products and more are increasingly willing to pay to verify the origin compared to the previous wave.

Other Elements of Importance to Retailer Choice

What other elements are important to you when choosing a jewelry retailer to buy from (rank in order of importance)?
Would you be willing to pay more for your top selection above?



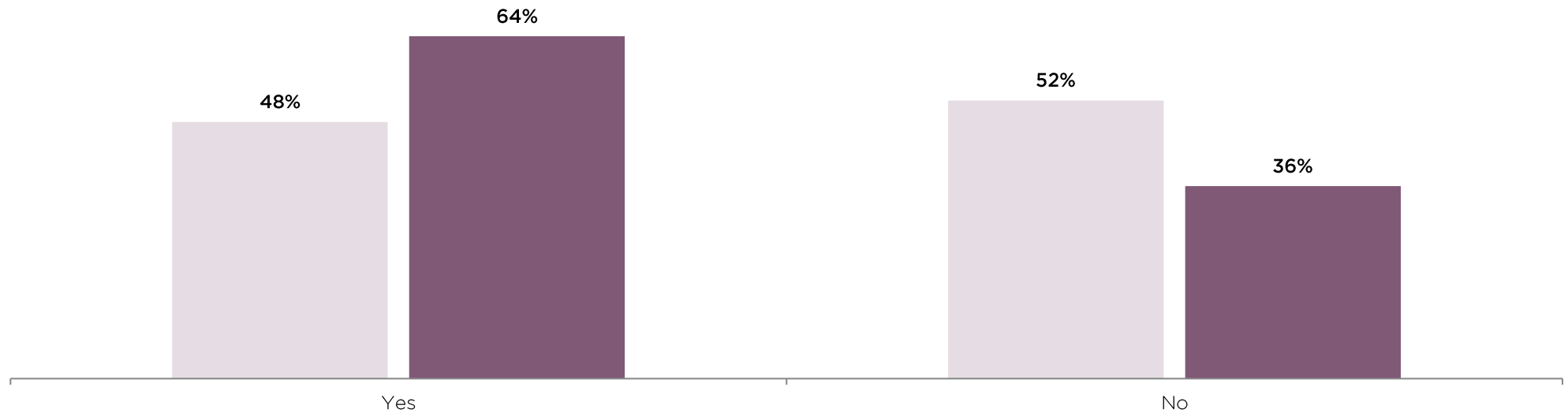
Survey February 2025 Survey February 2023



Less than half of respondents would purchase more from a jeweler to achieve VIP status, a decrease from the 2023 survey.

Desire VIP Benefits When Purchasing Jewelry

Would you purchase more from a jeweler to achieve VIP status and / or be part of a loyalty program that offers access to discounts, early access to new products and exclusive access to events?



Survey February 2025 Survey February 2023



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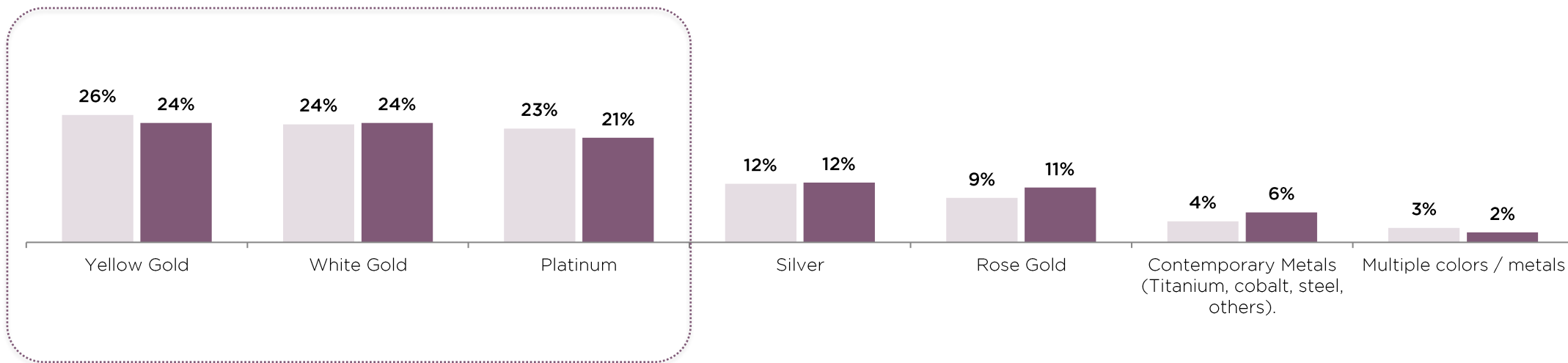
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Yellow gold, white gold and Platinum remain the preferred metals of choice.

Jewelry Precious Metal Preferences

When you buy pieces of jewelry, which metal do you prefer? Please rank in order of preference.

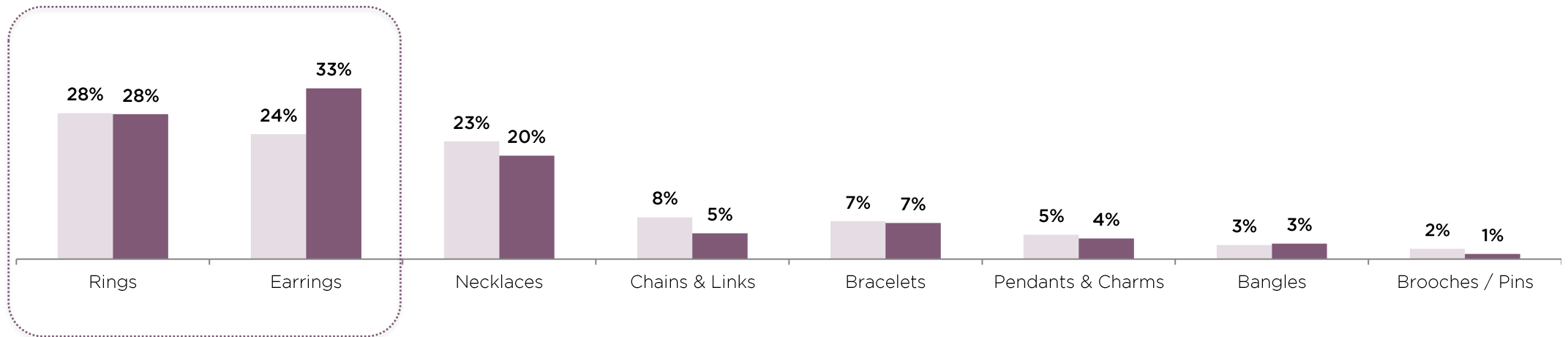


Survey February 2025 Survey February 2023

Rings and earrings remain the two most important types of jewelry; however, earrings are losing popularity compared to 2023 survey.

Preferred Jewelry Categories to Wear

Please rank in the level of importance the type of jewelry categories you prefer buying or wearing:



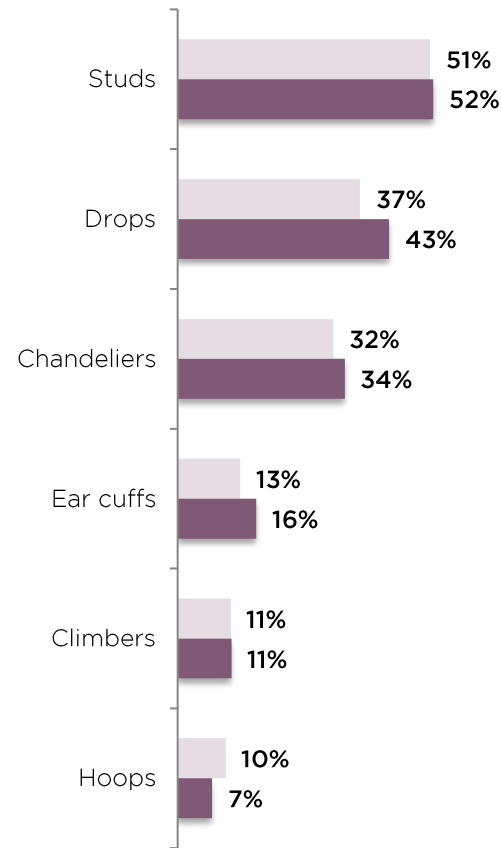
Survey February 2025 Survey February 2023



Similar to 2023, half of the respondents stated that they prefer stud earrings, while diamond or gemstone accents are favored for rings.

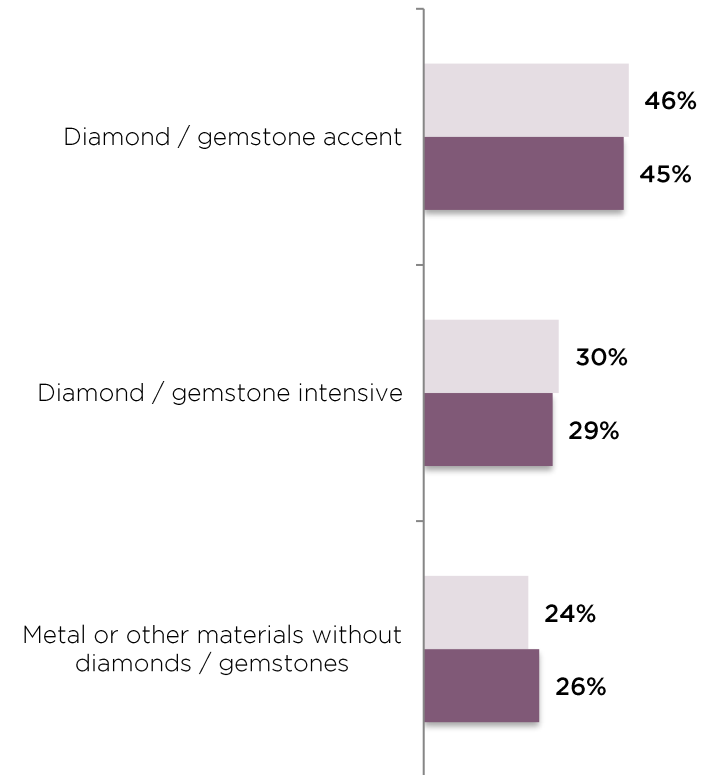
Earring Style Preferences

When purchasing earrings, which styles do you prefer? (Please choose all that apply)



Ring Gemstone Preferences

When purchasing or wearing rings, do you prefer:

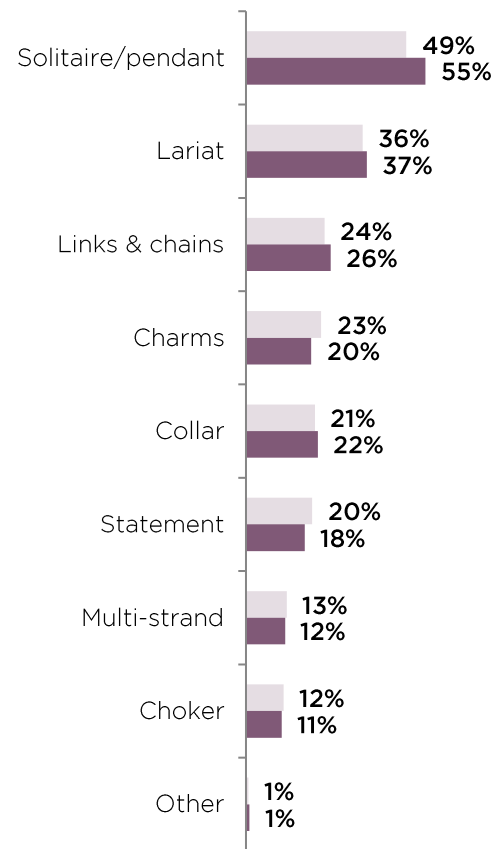


Survey February 2025 Survey February 2023

Solitaire necklaces remain the favorite choice among respondents. Additionally, 43% prefer those with a diamond or gemstone accent.

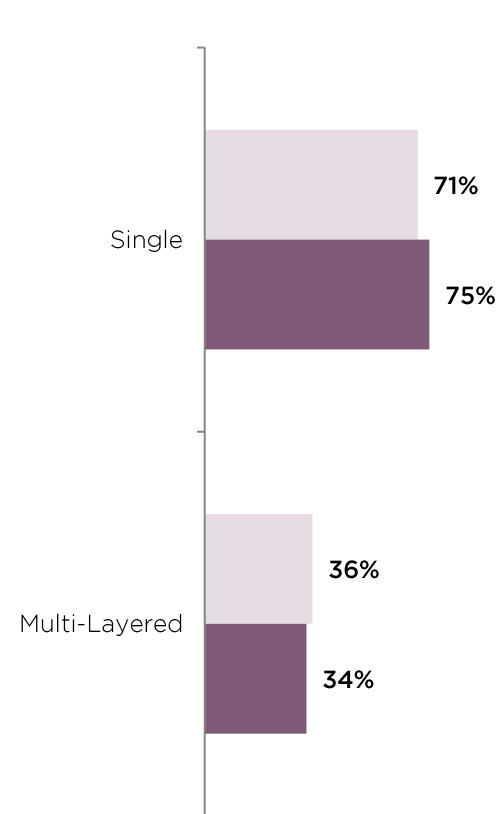
Necklace Style Preferences

When purchasing or wearing necklaces, which styles do you prefer? (Please choose all that apply)



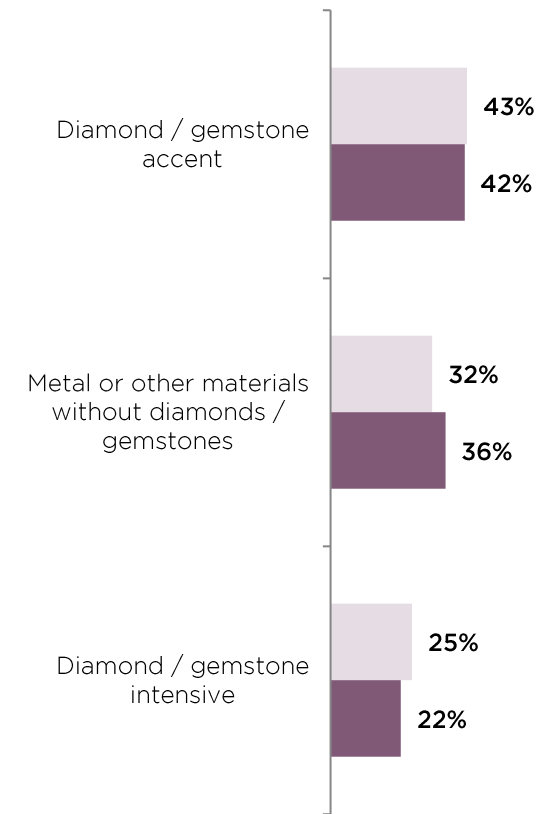
Necklace Styling

When wearing necklaces, how do you prefer to style them? (Please choose all that apply)



Necklace Gemstone Preferences

When purchasing or wearing necklaces, do you prefer:



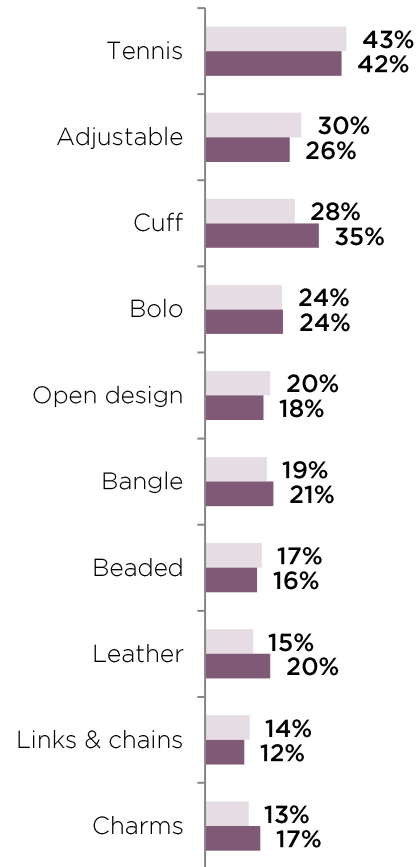
Survey February 2025 Survey February 2023



Tennis and adjustable styles are the most common for bracelets.

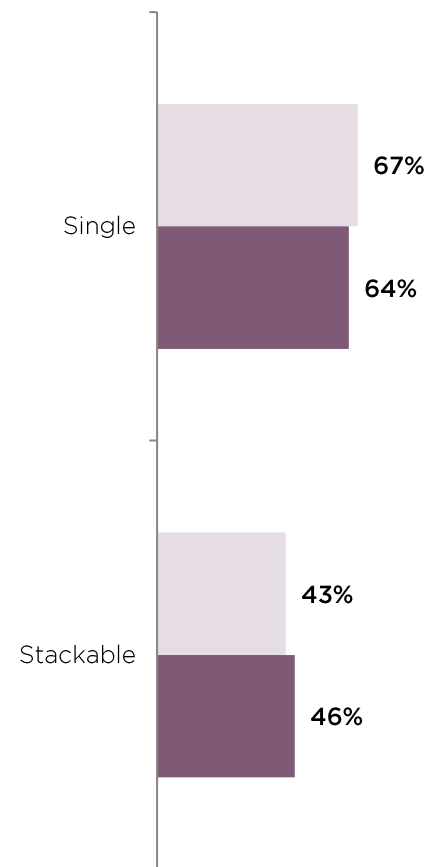
Bracelet Style Preferences

When purchasing bracelets, which styles do you prefer? (Please choose all that apply)



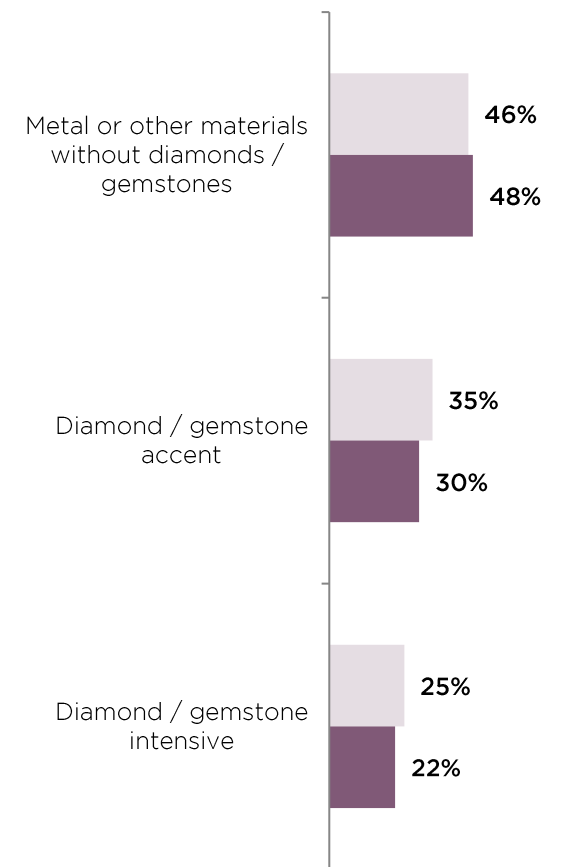
Bracelet Styling

When wearing bracelets, how do you prefer to style them? (Please choose all that apply)



Bracelet Gemstone Preferences

When purchasing or wearing bracelets, what do you prefer? Please select all that apply

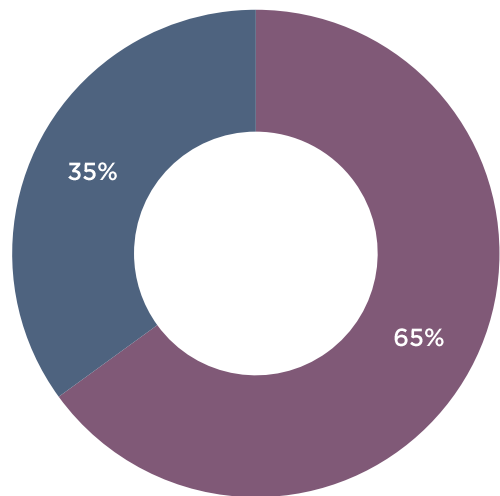


Survey February 2025 Survey February 2023

65% of respondents seek birthstone designs. Bright-colored gemstones have gained popularity, becoming the preferred option, along with pear-cut shapes.

Seek Out Jewelry with Birthstone?

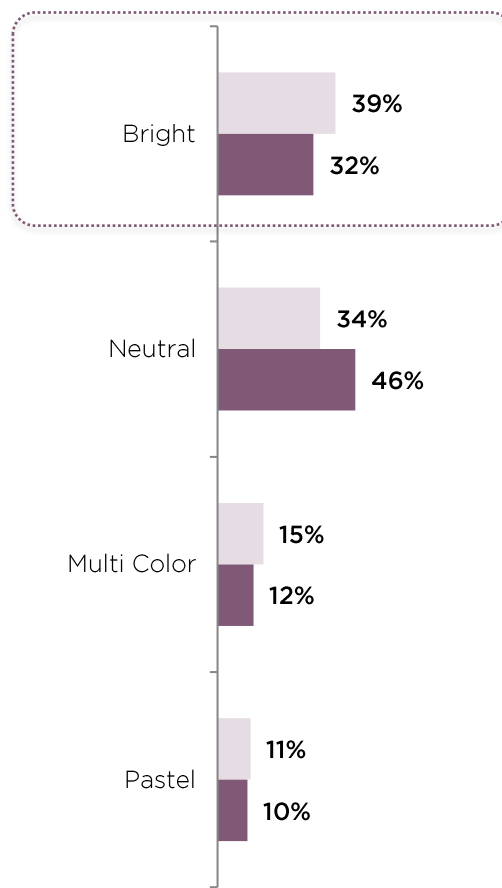
Do you seek out jewelry that has your birthstone in the design?



■ Yes
■ No

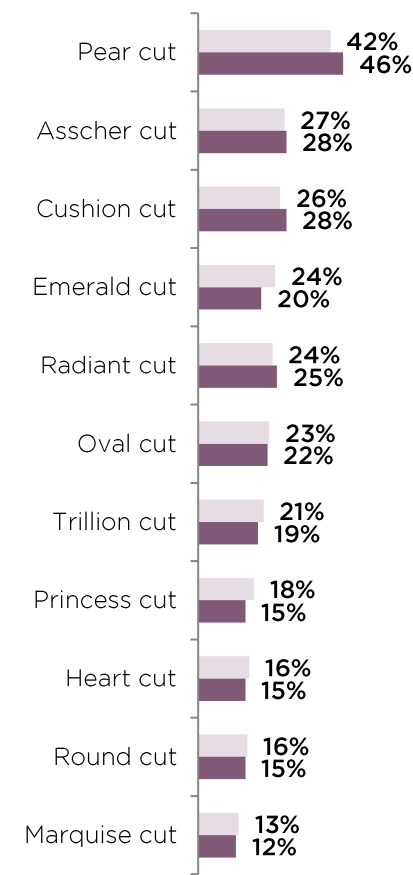
Gemstone Color Preferences

Please rank in order of preference: when buying color gemstone jewelry what color palette do you most prefer?



Gemstone Shape Preferences

When buying colored gemstone jewelry what shape do you most prefer? (Please choose all that apply)



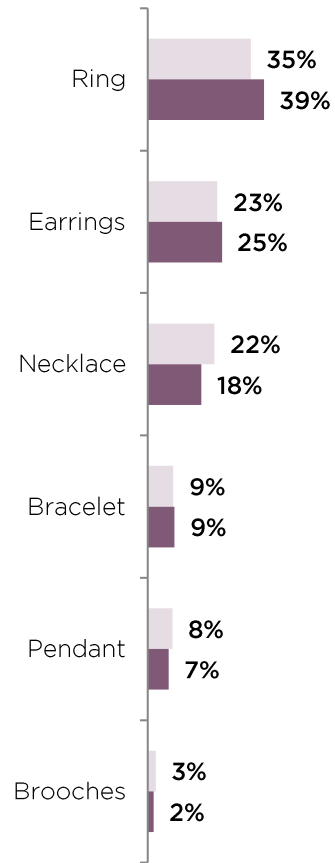
■ Survey February 2025

■ Survey February 2023

Ruby, Emerald and Sapphire remain most popular, with color preference and birthstone guiding choice.

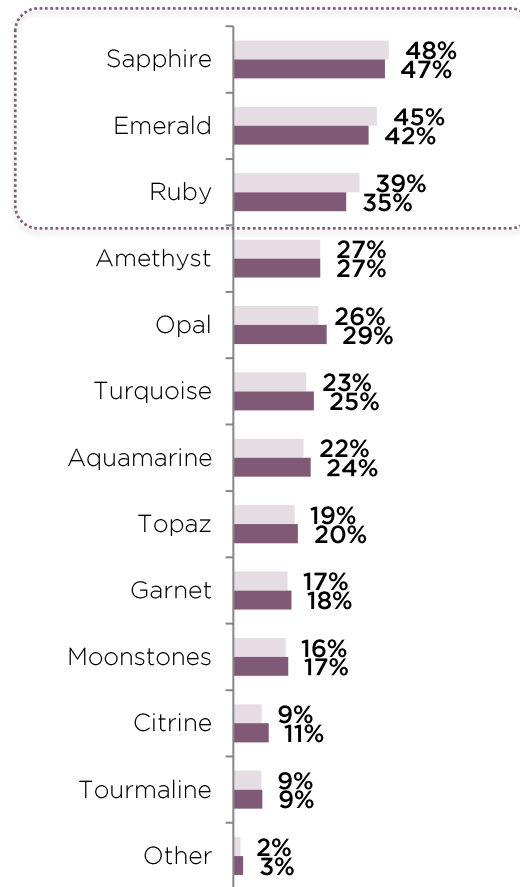
Gemstone Piece Preferences

Please rank in order of preference: when buying color gemstone jewelry, what kind of jewelry pieces do you prefer?



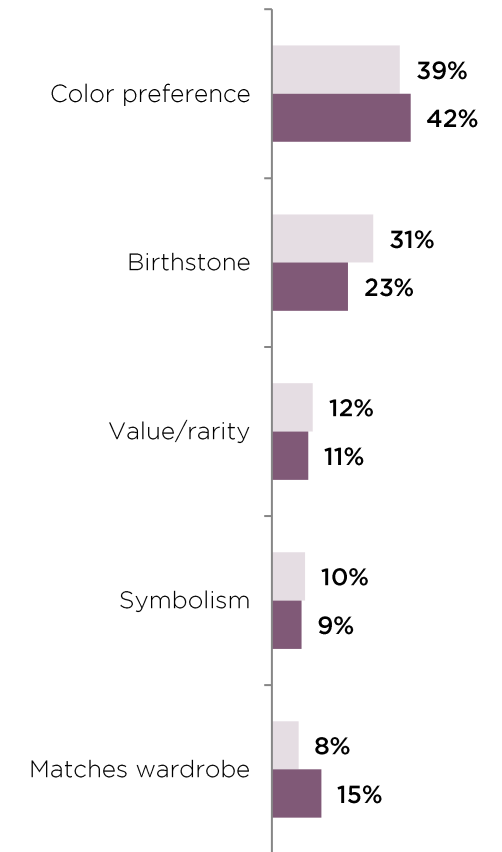
Stone Preferences

When buying color gemstone jewelry which gemstone do you most prefer? (Please choose all that apply)



Reason for Gemstone Color Preference

When buying color gemstone jewelry, why do you select one color over another?

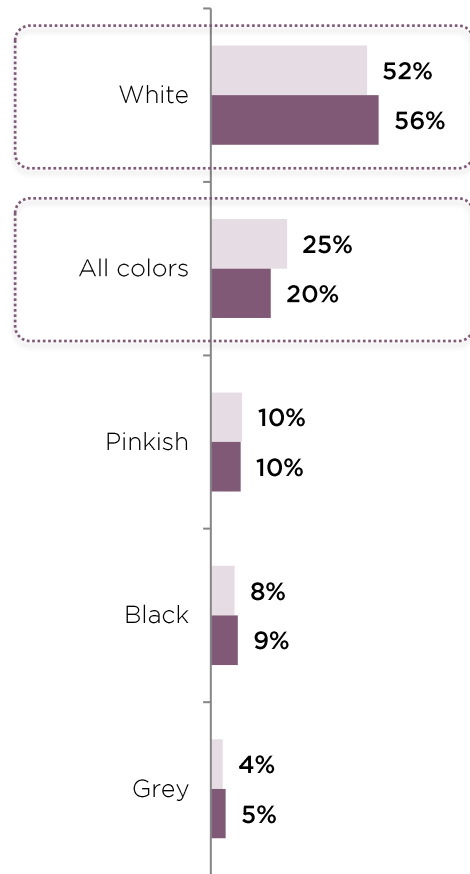


Survey February 2025 Survey February 2023

White pearls remain the most popular, with an increase in color starting to emerge with classic styling being a preference.

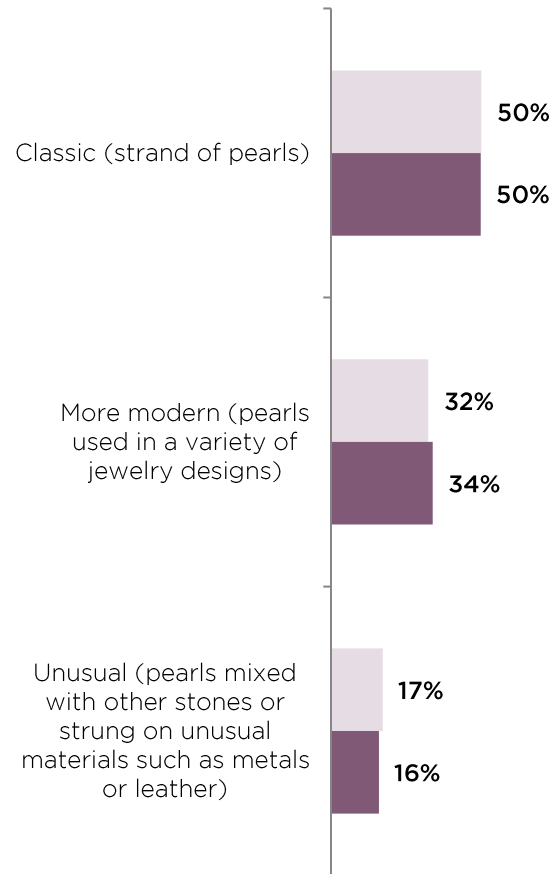
Pearl Color Preferences

Which color pearls do you most prefer?



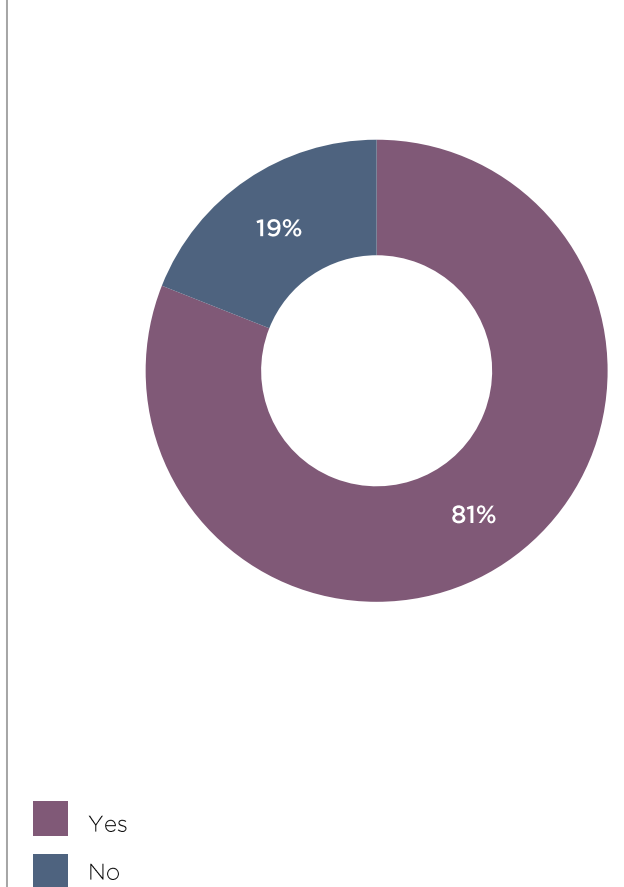
Pearl Jewelry Style Preferences

When buying pearl jewelry, which styles do you most prefer?



Gifting Pearl Jewelry?

Would you buy pearl jewelry as a gift?



Survey February 2025

Survey February 2023



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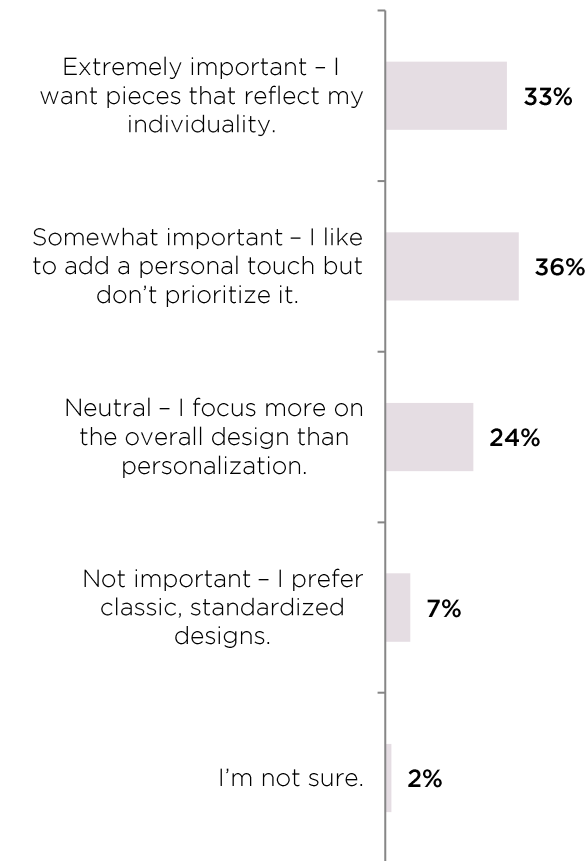
8. ADDITIONAL JEWELRY QUESTIONS

9. STUDY DEMOGRAPHICS

Nearly 70% of respondents consider personalization important when selecting jewelry and would like specific messages or symbols on their pieces.

Personalization importance

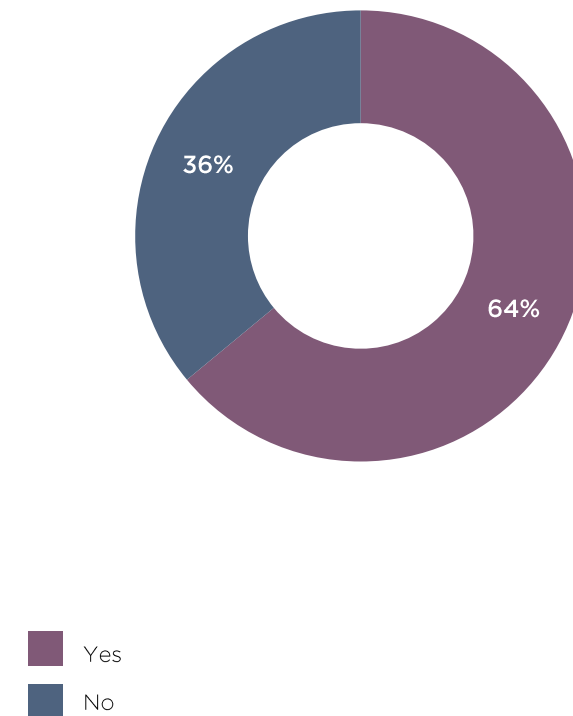
How important is personalization to you when selecting jewelry?



*Added in February '25

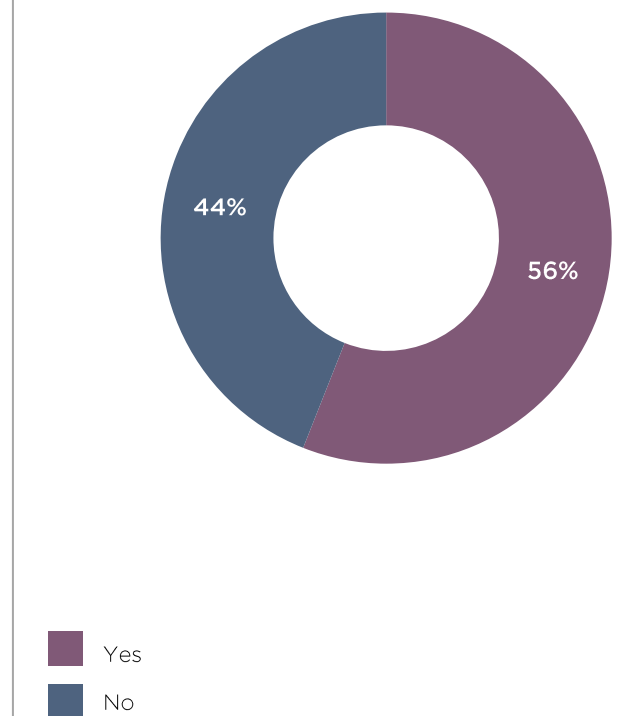
Interest in Personalizing Jewelry

When buying jewelry, would you like to personalize the piece with a specific message or symbols? For example, initials, names, letters, dates.



Smart Jewelry Consideration

Have you purchased, or would you purchase jewelry (excluding watches) that have technology worked into the design (smart rings, smart necklaces, etc.)?

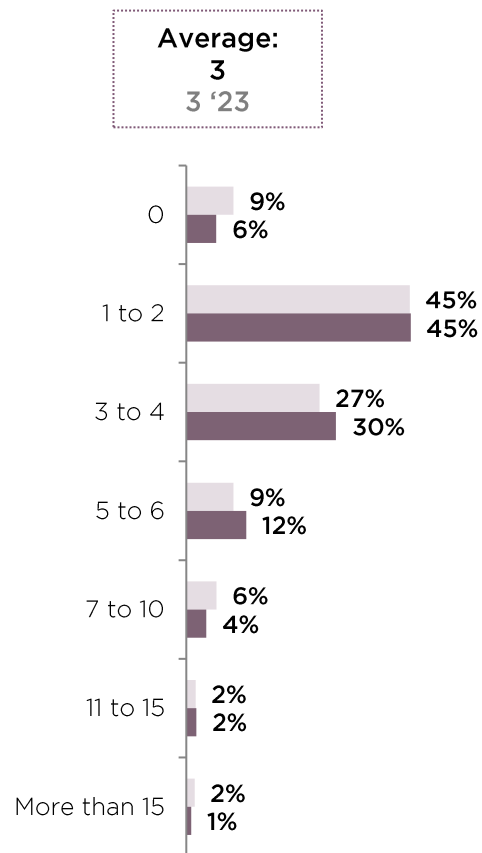




The average number of watches owned remains at three per person. Classic watches have increased from the 2023 survey, while smartwatches have declined.

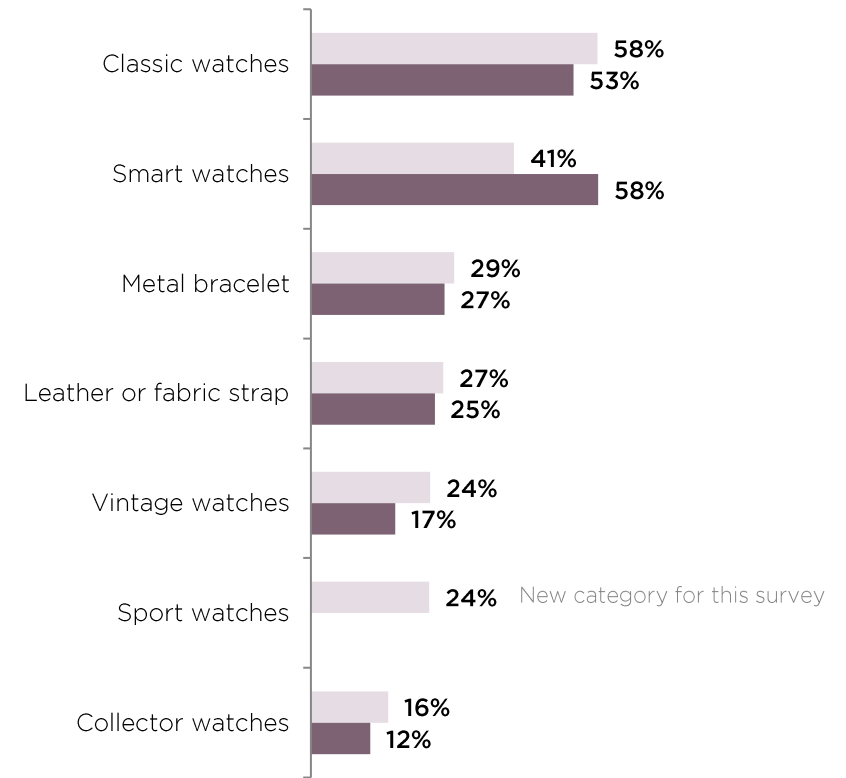
Number of Watches Owned

How many watches do you own?



Watch Style

How would you define your watch(es) and/or watch style?
Please check all that apply.



Survey February 2025 Survey February 2023



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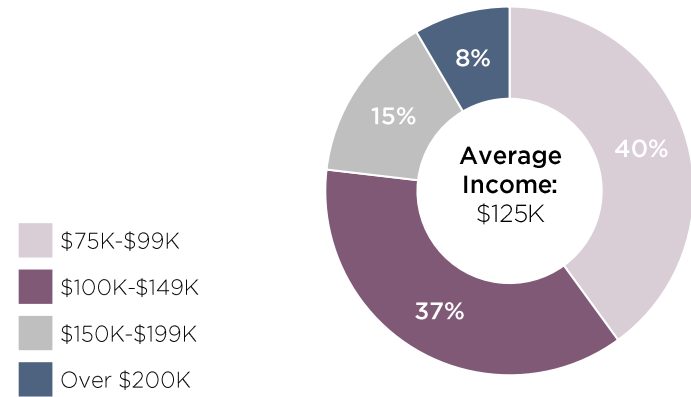
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Demographics - Survey February 2025

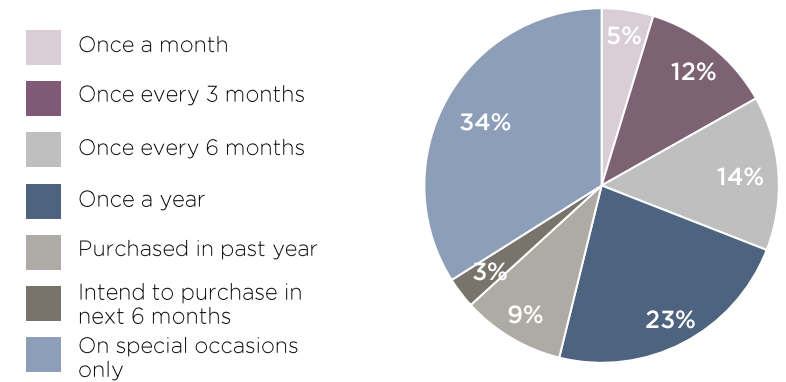
Combined Household Income

Percent Selected



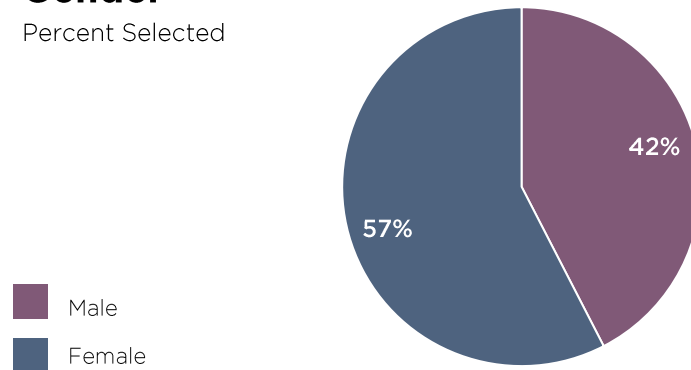
Frequency of Jewelry Purchase

Percent Selected



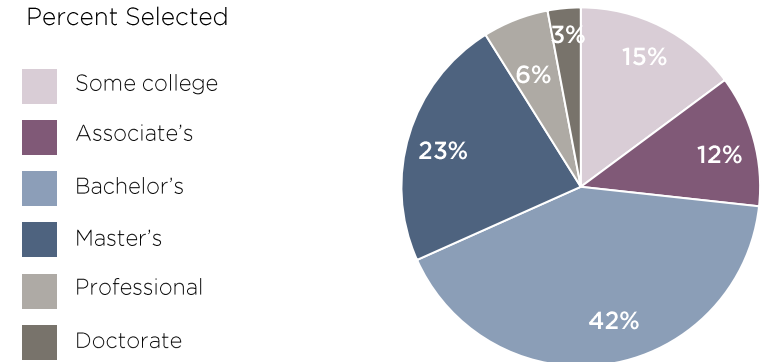
Gender

Percent Selected



College Education

Percent Selected





3.

US JEWELRY MARKET FOCUS

INSIGHTS & DATA



Photo Credits: Swarovski

“ JEWELRY SHOPPERS REMAIN RESILIENT— 27% OF 2025 RESPONDENTS PLAN TO SPEND THE SAME OR MORE ON JEWELRY, UP FROM 20% IN 2023.

Source: The Plumb Club Survey 2025

US JEWELRY MARKET DYNAMICS

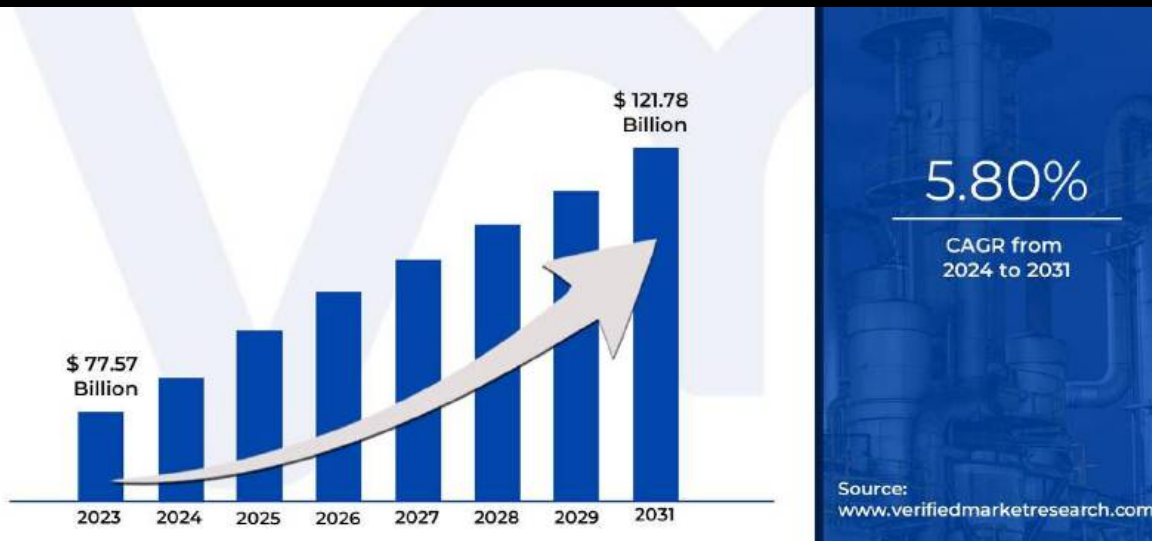
The U.S. jewelry market was valued at USD 77.57 billion in 2023 and is projected to reach USD 121.78 billion by 2031, reflecting a compound annual growth rate (CAGR) of 5.80% from 2024 to 2031. According to Grand View Research, the United States accounted for 20.76% of the global jewelry market in 2023, ranking behind only China and India in total revenue. Notably, the domestic market's projected growth rate represents a significant increase from the 2.76% CAGR forecasted just two years ago. According to Statista, as of 2024, fashion jewelry purchases dominated the market, totaling 89% of sales.

Despite ongoing geopolitical and economic uncertainty—including the recent U.S. presidential election, conflicts in Ukraine and the Middle East, and a mixed economic outlook—certain factors are directly influencing the jewelry industry. One of the most significant effects is the rising price of gold, driven by market volatility and its role as a safe-haven asset. Higher gold prices impact both production costs and consumer purchasing decisions, shaping trends in material choices and pricing strategies.

At the same time, jewelry continues to be viewed as a hedge against instability, attracting consumers who see it as both a meaningful adornment and a tangible investment. This dual appeal reinforces the industry's resilience, even amid fluctuating economic conditions.

Still, according to The Plumb Club Survey 2025, inflation and the rising cost of goods will affect consumers' purchasing plans in the coming year. More respondents to the 2025 survey (31%) said they would wait for “special deals, discounts or promotions” compared to 2023 respondents (29%). Despite price sensitivity, jewelry consumers don't intend to curtail their shopping habits; 27% of 2025 survey respondents mentioned spending the same amount or more on jewelry than the previous year, up from 20% in 2023.

US JEWELRY MARKET SIZE



Source: <https://www.verifiedmarketresearch.com/product/u-s-jewellery-market/>

U.S. Jewelry Market size was valued at USD 77.57 Billion in 2023 and is projected to reach USD 121.78 Billion by 2031, growing at a CAGR of 5.80% from 2024 to 2031.

DEMOGRAPHIC DOWNSHIFT

The Rise of Gen Z and Alpha

The center of gravity of generational power is poised to ease away from Baby Boomers and Gen X. Generation Z (born 1996-2009) is rising to become a significant and influential force in the watch and jewelry sphere, joining Millennials (born 1980-1996) as the dominant shopping demographic. Bain & Company's "Long Live Luxury" report states that by 2030 Gen Z will "account for 25% to 30% of luxury market purchases, while millennials will account for 50% to 55%."

Retailers and manufacturers would do well to be sensitive to the values and habits of this group. The Bain report emphasizes that Gen Z, in particular, is taking the lead on "social and cultural change, inspiring other generations' value systems, with a strong desire for lived experiences and a quest for meaning." And not to be forgotten, Generation Alpha, the youngest living generation (born after 2010), is the most racially diverse ever (the first with fewer than half identifying as white, according to Statista) and is focused on inclusion and treating everyone fairly.

According to Grand View Research, Gen Z's open-minded attitude, focus on sustainability, and digital native status translate to a litany of market trends to consider. Sustainable practices, new ownership models—purchases of pre-owned goods or rental programs—and robust digital platforms are essential to attract the demographic.

Branded jewelry is particularly appealing to younger consumers, who prioritize brand identity, craftsmanship, and authenticity. Branded jewelry refers to pieces designed, marketed, and sold under a recognized brand name, ranging from luxury houses and designer labels to celebrity-backed collections and emerging contemporary brands. Unlike unbranded or generic jewelry, these pieces often carry distinct design signatures, storytelling, and brand prestige, influencing consumer perception and value.

In 2021, 76% of Gen Z and 72% of millennials purchased branded jewelry, compared to 64% of Gen X and 38% of baby boomers, highlighting a generational shift in purchasing behavior.



Photo Credits: Tasaki



Photo Credits: Doucheron NYC Boutique

“ THE PLUMB CLUB SURVEY 2025 FINDINGS INDICATE THAT INDEPENDENT JEWELRY STORES ARE THE SOURCE OF 43% OF JEWELRY PURCHASE. ”

Source: The Plumb Club Survey 2025



Photo Credits: Jennifer Fischer



Photo Credit: @trembleam_ on ig

SALES CHANNELS (Online & Offline)

As of 2023, there were 17,124 retail jewelry companies in the United States, representing the largest sector of the industry, according to the Jewelers Board of Trade. California had the highest number of jewelry stores, followed by New York and Florida. However, the number of jewelry stores in the United States decreased by 3.2% from 2023 to 2024.

In total, 24,378 people are employed in United States jewelry manufacturing, while 136,828 work in United States jewelry retail. Both categories saw a decline in total employment at an annualized rate of just over 5% from 2018 to 2023.

Jewelry remains a highly personal shopping experience, with a significant portion of purchases still happening at independent local businesses instead of large retail chains. According to The Plumb Club Survey 2025, independent jewelry stores account for 43% of jewelry purchases. Large jewelry groups such as Signet in the United States, Chow Tai Fook in China, and Christ in Germany, collectively hold only about 12% of the global jewelry market.

Branded jewelry, which includes luxury jewelry brands, fashion labels, and emerging direct to consumer lines, currently represents about 20% of the market. However, this share is expected to grow as Generation X, Millennials, and Generation Z exhibit a stronger preference for branded pieces compared to Boomers. The expansion is being driven by both an increase in established retailers carrying more branded collections and the rise of new brands entering the market. According to The Plumb Club Survey 2025, 64% of respondents believe it is "important" or "very important" that a store carries recognized name brands, a figure that has increased by 6% since 2023. Name brands include internationally recognized jewelry brands as well as store exclusive private labels, which are increasingly marketed with strong brand identities.

The digital channel continues to expand, with the average budget for online jewelry spending rising to \$1,652 in 2025, a 22% increase from 2023. Direct purchasing from watch and jewelry brands remains the leading online shopping channel at 34%, up 3% from 2023, followed by websites of independent and local jewelers at 26%, down 1% from 2023.



GOLD & PRECIOUS METALS

As the most in-demand material in contemporary jewelry, gold is a precious material indispensable to every segment of the industry, luxury or not. But in 2024, gold witnessed steep price increases, escalating to double-digit percentages starting in March. By August, the gold futures for the precious metal reached historic highs, crossing the USD 2,500/ounce mark for the first time.

The escalating sums have, unsurprisingly, crimped gold jewelry demand. During the second quarter of 2024, US demand for gold jewelry was 5% off 2023 levels, according to the Gold Demand Trends report from the World Gold Council.

International tumult also moves the gold market upward. The material's utility as a hard asset has been a critical factor in gold's changing fortunes. In mid-February, Goldman Sachs increased its year-end 2025 gold price forecast to \$3,100 per ounce, up from \$2,890, due to projected central bank demand.

The price increases have led to shifts to mixed metal designs, a growing interest for other metals, especially silver, and jewelry designs in gold that create a premium, substantial look while using less gold weight. Nevertheless, in The Plumb Club Survey 2025, yellow gold is the leading precious metal for jewelry, with 26% of respondents indicating it is their first choice. That figure increased by two percentage points from 2023. The preference for white gold remained steady from 2023 to 2025 at 24%.

Demand for platinum from independent retailers and major chains has increased. The white metal is now priced at less than half of what gold commands for an ounce. Platinum sales from Platinum Guild International's primary strategic partner increased 6.8% year-on-year (Source: Platinum Jewellery Business Review, 2024).

“YELLOW GOLD REMAINS THE TOP CHOICE— 26% OF 2025 SURVEY RESPONDENTS PREFER IT, UP TWO POINTS FROM 2023.”

Source: The Plumb Club Survey 2025

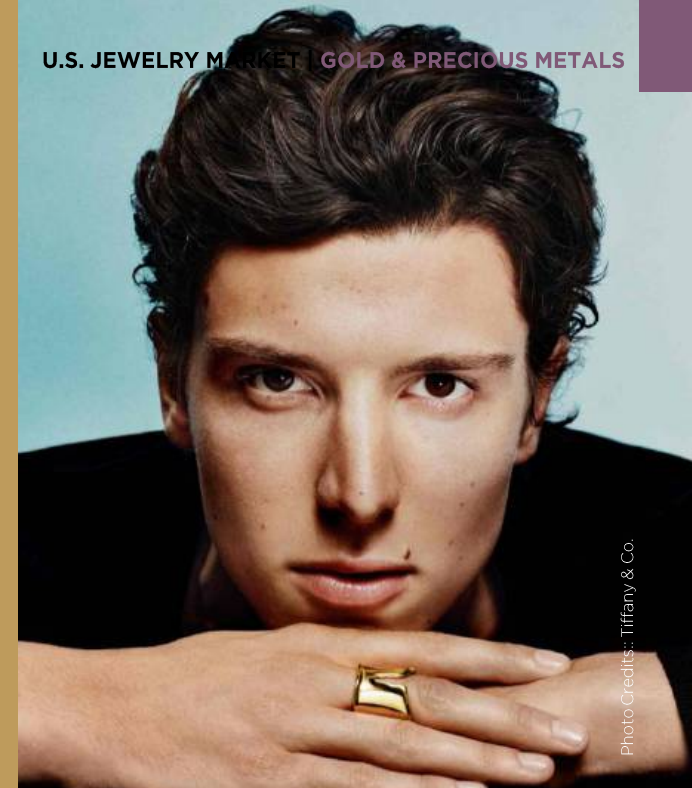


Photo Credits: Tiffany & Co.

GOLD PRICE QUOTATION



Source: <https://goldprice.org/>

60 Day Gold Price In USD/oz From December 26th, 2024, to February 26th, 2025.



Photo Credits: Silvia Furmanovich

“THE PLUMB CLUB SURVEY 2025 NOTES A SLIGHT INCREASE IN CONSUMER OPENNESS TO PRE-OWNED JEWELRY AND WATCHES, SIGNALING A BROADER ACCEPTANCE OF NON-TRADITIONAL MATERIALS.

Source: The Plumb Club Survey 2025



Photo Credits: Fernando Jorge



Photo Credits: Dezzo Sara

NON-TRADITIONAL MATERIALS

The U.S. luxury jewelry market is undergoing a transformation, driven by increasing consumer demand for ethical and environmentally conscious products. Today's buyers are not solely focused on aesthetic appeal but seek pieces that align with values such as sustainability, traceability, and social responsibility.

According to The Plumb Club Survey 2025, responsible business practices have gained importance across all categories, with more consumers willing to pay a premium for ethical sourcing and fair-trade labor. Additionally, the survey indicates that fewer respondents are willing to purchase jewelry without verifying its source, reinforcing the necessity for transparency in materials and manufacturing.

Recycled gold and gemstones are now staples in eco-conscious collections, but forward-thinking jewelers are pushing the boundaries by incorporating unconventional materials that merge craftsmanship with sustainability. For instance, Chilean artisans preserve ancestral weaving techniques by crafting bespoke jewelry from horsehair, while Sicilian goldsmiths are pioneering the fusion of lost wax casting with electronic waste, redefining heritage craftsmanship through contemporary innovation.

The use of alternative materials is gaining traction in the luxury segment. Leather, plastic, resin, and glass are increasingly being used as high-end design elements. Recycled plastic waste is being transformed into vibrant, modern pieces that challenge conventional notions of luxury, while bio resin sourced from organic compounds enables bold colors and unique forms, often encapsulating natural elements like flowers and leaves. The shift toward organic materials such as wood, stone, and bone, which were among the earliest forms of adornment, reflects a growing consumer desire for authenticity and nature-driven aesthetics in an increasingly digitalized world.

Despite these innovations, The Plumb Club Survey 2025 highlights that consumers still place the highest value on diamond and gemstone quality when justifying a jewelry purchase. However, the rising importance of sustainability and ethical business practices suggests that alternative materials will continue to gain ground, particularly among younger generations who prioritize value driven consumption.

COLORED GEMSTONES

According to an Access Newswire report, the colored gemstones market is currently valued at USD 1.9 billion and projected to reach USD 5.7 billion by 2035. During this projected period, sales of colored gemstones are expected to increase at a CAGR of 11.3% (Source: Future Market Insights, Coloured Gemstone Industry Outlook).

North America is the leading segment of the gemstone market, with the United States accounting for the lion's share of the region's consumption at 84.1%. The US is responsible for one third of the global demand for colored stones.

Demand for many colored stones has spiked since 2021. Rubies, sapphires, and emeralds, otherwise known as the "big three," are seeing the most significant price increases among colored gemstones, with blue sapphires as the top seller in the Western market (Source: National Jeweler, 2024).

Commercial quality gems remain widely available, albeit at higher prices than previously. However, high end untreated gems, which constitute less than 1% of production, have become exceedingly scarce (Source: Rapaport, 2024).

Additionally, the wide variety among colored stones, in terms of color and type, provides opportunities for individual gems to grab headlines and market share when the right pop culture moment arises. The popularity of Charli XCX's Brat album has increased awareness of peridot, thanks to its signature green color. Similarly, the release of the Barbie movie in 2023 sparked a surge in demand for pink gemstones.

Consumers are particularly interested in jewelry featuring their birthstone. The Plumb Club Survey 2025 indicates that 65% of respondents seek out such pieces. In general, there has been a shift toward gems whose color could be classified as "bright." 39% of those surveyed preferred such hues, up from 32% in 2023. Neutral gems have declined significantly in popularity, from 46% to 34% during the same interval.



Photo Credits: @mariehelenedetailiac



Photo Credits: Mateo NYC

“ PEARLS REMAIN A TIMELESS FAVORITE— 81% OF CONSUMERS WOULD GIFT PEARL JEWELRY, WITH RISING INTEREST IN COLORED VARIETIES.

Source: The Plumb Club Survey 2025

PEARLS

The pearl jewelry market is positioned for significant growth in the United States and globally. According to Custom Market Insights, the global pearl jewelry market is expected to achieve a CAGR of 11.5% from 2024 to 2033, growing from approximately USD 13 billion in 2024 to around USD 28 billion by 2033 (Source: CMI Consulting, Global Pearl Jewelry Market Size, Share 2025 2034).

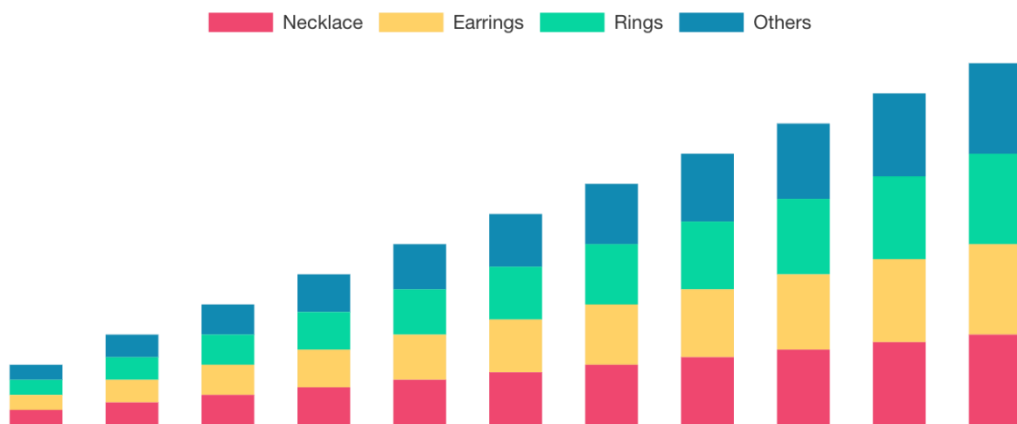
Sustainability has also emerged as a factor driving the desire for pearls, with consumers gravitating toward ethically sourced pearls. Innovative design is another key trend. There is surging interest in modern styles that appeal to younger, fashion forward demographics. These designs, combined with pearls' timeless elegance, are broadening the appeal of pearl jewelry.

After a series of shocks to the pearl market, including massive pearl demand in China, reduced Japanese production, and the lingering effects of the pandemic, dwindling supply and rising pearl prices have reshaped the industry. The market is projected to stabilize in 2025, making the gems more accessible to customers in the US and beyond (Source: AGTA, 2024).

The Plumb Club Survey 2023 emphasized the strong appeal of pearl jewelry among Millennials, particularly within the 25 to 35 year old demographic. Pearls are nearly universal in their appeal as a gift item, with 81% of respondents to The Plumb Club Survey 2025 indicating they would buy pearl jewelry for someone.

White pearls remain the most popular choice, with 52% of this year's survey respondents naming it their preferred color. That figure dropped four points from 2023. Colored pearls jumped in popularity as a top preference from 20% in 2023 to 25% in 2025. A classic strand of pearls remains a staple, with half of survey respondents naming it the top style to buy in 2025.

GLOBAL PEARL JEWELRY MARKET BY TYPE 2025-2034



Source: <https://www.custommarketinsights.com/report/pearl-jewelry-market/>



THE FUTURE OF DIAMONDS

Natural & Lab-Grown

According to jewelry analytics firm Tenoris, diamond and jewelry sales revenue declined by 0.6% in the first half of 2024, with lagging demand for natural diamonds. The market's direction has been unpredictable, with sales increases in some months, February, April, and May, and declines in others, January, March, and June, based on data culled by Tenoris from approximately 2,000 US independent retailers.

In June 2024, only one category saw an increase in the total number of units sold: bracelets, which rose by 5.7%, driven by the strength of tennis bracelet sales.

High budget jewelry buyers are still investing in natural diamonds, even as other market segments struggle. Demand for natural diamonds remains strong among high spending jewelry buyers. According to Tenoris' Edahn Golan, jewelry purchases in the \$20,000 to \$50,000 range saw double digit growth, bucking the trend of decline in most other categories.

Consumers consider the quality of diamonds in jewelry as a key factor in justifying the price of an item. 30% of respondents to The Plumb Club Survey 2025 cited diamond or gemstone quality as the most important factor, a 3% increase since 2023. All other jewelry characteristics lag in importance by at least 50%. Another factor influencing pricing is traceability; 94% of those surveyed in 2025 indicated they would pay a premium to know the origin of their stones, with 22% willing to pay "a great deal (up to 25% more)" for such information. In 2023, a similar number of respondents, 93%, harbored the same sentiment.

Natural diamond jewelry faces growing competition, particularly from lab-grown diamonds. It also faces competition from other categories. While natural diamond jewelry remains highly desirable among consumers, as indicated by the most recent De Beers Diamond Acquisition Study, it still ranks behind international travel and weekend getaways as the most desired gift. Meanwhile, De Beers announced in 2024 that it will no longer invest in the lab-grown diamond sector, signaling "a strategic focus on the enduring value of natural diamonds" (Source: De Beers, 2024).

“QUALITY DRIVES VALUE—30% OF CONSUMERS CITE DIAMOND OR GEMSTONE QUALITY AS THE TOP FACTOR, WITH DEMAND FOR TRACEABILITY SURGING.”

Source: The Plumb Club Survey 2025

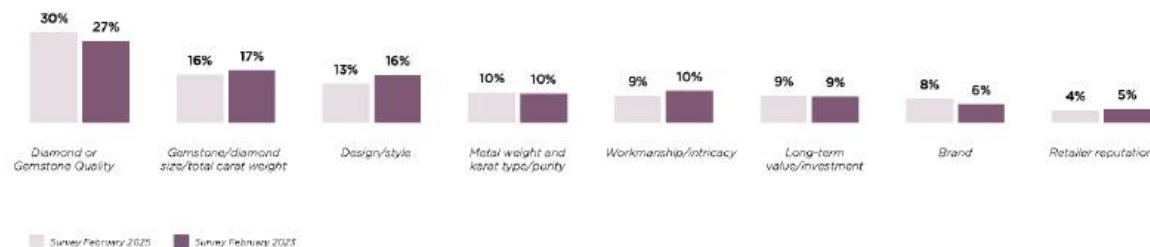


Photo Credits: Messika

DIAMOND/GEMSTONE QUALITY IS THE TOP FACTOR IN JUSTIFYING THE PURCHASE OF JEWELRY

Elements Most Justifying Price of Jewelry

Which are the elements of jewelry that you feel most justify the price? Please, rank in order of importance.



Source: The Plumb Club Survey 2025



Photo Credits: Pandora

“CONSUMER AWARENESS OF LGDS IS RISING—34% OF 2025 SURVEY RESPONDENTS CONFIDENTLY UNDERSTAND THE DIFFERENCE, UP FROM 21% IN 2023.”

Source: The Plumb Club Survey 2025

Photo credits: VRAI

FOCUS ON LAB-GROWN DIAMONDS

The lab-grown diamond (LGD) market is projected to grow from USD 25.68 billion in 2024 to USD 28.27 billion in 2025, reflecting a compound annual growth rate (CAGR) of 10.1%. By 2029, the market is expected to reach USD 38.86 billion, with a CAGR of 8.3% (Source: The Business Research Company, 2024). This growth is driven by advancements in laser technology, increasing adoption in fashion and jewelry, rising consumer demand for lab-grown diamonds, and overall economic expansion. Key trends shaping the forecast period include continuous product innovation, advancements in chemical vapor deposition (CVD) and laser technology, and an increase in strategic industry collaborations.

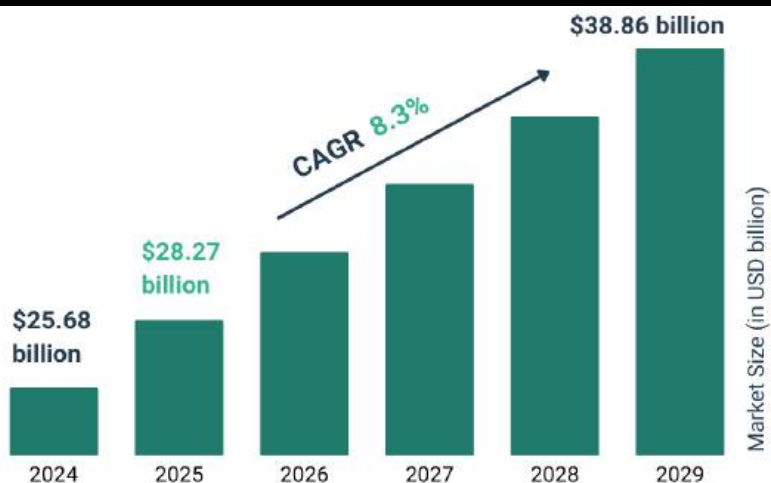
The United States remains the dominant market for LGDs, accounting for 75% of retail sales. Consumer adoption has been significant, with the average carat weight of LGDs in finished jewelry increasing from 1.35 in July 2023 to 1.57 in July 2024. However, challenges persist in markets such as China and India, where LGDs struggle to gain traction due to their low resale value and limited perception as intergenerational assets.

Boston Consulting Group's "Future of the Natural Diamond Industry" report highlights that over 70% of consumer conversions to LGDs from natural diamonds occur in-store. However, as LGD prices continue to decline, retailers have fewer incentives to actively promote them over natural diamonds, which offer higher profit margins.

While many luxury jewelry brands have yet to embrace LGDs, their potential entry into the market could be transformative. A move by high-end maisons would elevate the perception of LGDs, positioning them within the luxury space and significantly influencing consumer desirability and industry dynamics.

Consumer awareness of LGDs is growing steadily. According to The Plumb Club Survey 2025, 34% of respondents confidently understood the difference between LGDs and natural diamonds, up from 21% in 2023. An additional 49% reported some awareness of the key differences but lacked full confidence in their knowledge. Only 17% of consumers admitted to having no understanding of the difference—an improvement from 32% in 2023. These insights indicate a rapid increase in consumer education or research, which is likely to impact purchasing decisions and industry strategies moving forward.

LGD GLOBAL MARKET, 2024-2029



Source: <https://www.thebusinessresearchcompany.com/report/lab-grown-diamonds-global-market-report>

The lab-grown diamond market size will grow from USD 25.68 billion in 2024 to USD 28.27 billion in 2025 at a compound annual growth rate (CAGR) of 10.1%, reaching USD 38.86 billion in 2029 at a compound annual growth rate (CAGR). This data includes industrial uses of LGD as well.

NATURAL DIAMONDS & LAB-GROWN DIAMONDS

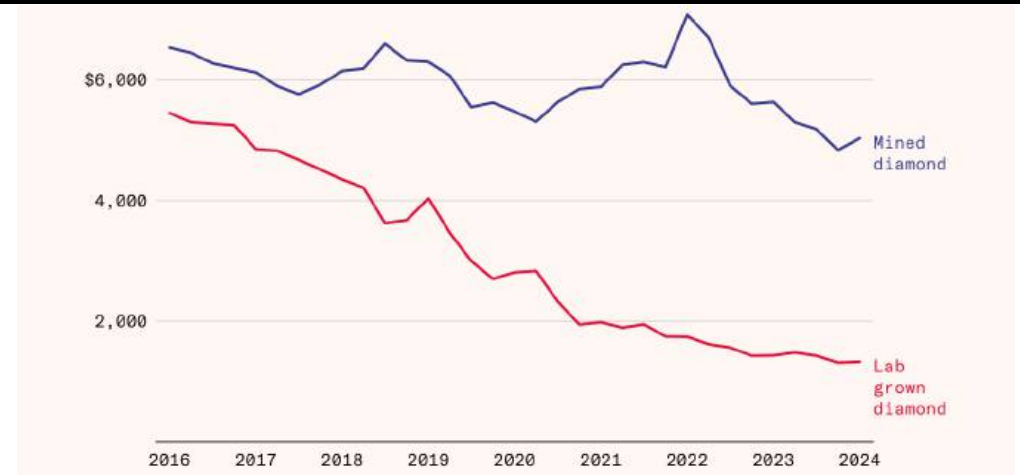
The combination of low production costs of approximately USD \$150 per carat and high wholesale prices (about USD 3,000 per carat) produced generous profit margins for LGD producers before 2020, resulting in a flood of new players in the space and investment in new technologies, according to the Boston Consulting Group Report on The Future of the Natural Diamond Industry. With current production costs at USD 100 and wholesale prices down to about USD 200 per carat, margins have declined radically, with retail price reductions of approximately 70% since 2018. Consequently, retailers must sell clients stones in large sizes to achieve profits comparable to six years ago.

LGDs have expanded substantially to the fashion jewelry category. Once limited to engagement rings and jewelry basics like stud earrings, lab-grown gems have become widely available in a broader range of goods. There is a significant market for such pieces. According to The Plumb Club Survey 2025 results, 65% of participants would consider buying fashion jewelry featuring LGDs. In a head-to-head comparison of two diamonds of the “same cut, color, quality and size,” 49% of respondents preferred natural diamonds, while 34% had no preference, and 17% chose LGDs.

But the natural diamond dream lives on. While the jewelry market is experiencing heightened volatility, natural diamonds remain a contender for consumer attention, particularly in the loose diamond and fashion jewelry categories. In the US in July 2024, revenue from loose and finished natural diamond jewelry sales increased by 8.5%, with the average spend per unit up by 5%. It indicates that clients were buying more items and more expensive pieces overall, underscoring the appeal of natural diamonds to affluent clients in particular (Source: Tenoris, Diamond Sales Leaped in July). That demographic feels “personally stable or better off financially, but they are less optimistic about the broader U.S. economy,” as a result of the current political and economic landscape.



NATURAL & LAB-GROWN DIAMOND PRICES



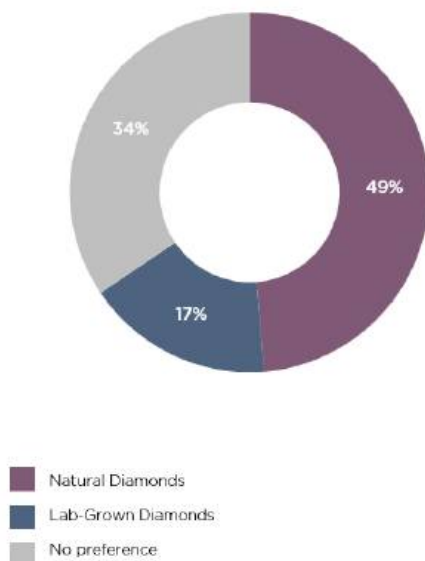
1 Carat diamonds, Retail Price in USD . All diamonds are non-branded, round in shape, very slightly included in clarity, near-colorless, and very good to ideal cut.

Source: <https://flowingdata.com/2024/09/06/falling-cost-of-lab-grown-diamonds/>

“LAB-GROWN DIAMOND ENGAGEMENT RINGS GAIN ACCEPTANCE—74% OF RESPONDENTS ARE OPEN TO GIVING OR RECEIVING ONE.”

Source: The Plumb Club Survey 2025

CONSUMER PREFERENCE OF DIAMOND TYPES



Source: The Plumb Club Survey 2025

CONSUMER SENTIMENT TOWARDS LAB-GROWN DIAMONDS, FASHION AND BRIDAL

Lab-grown diamonds have made significant inroads into the wedding category. In fact, nearly half of engagement ring center stones were reported to be lab-grown in 2023 (46%), nearly four times as high as it was in 2019 (12%), according to The Knot 2023 Real Weddings Survey.

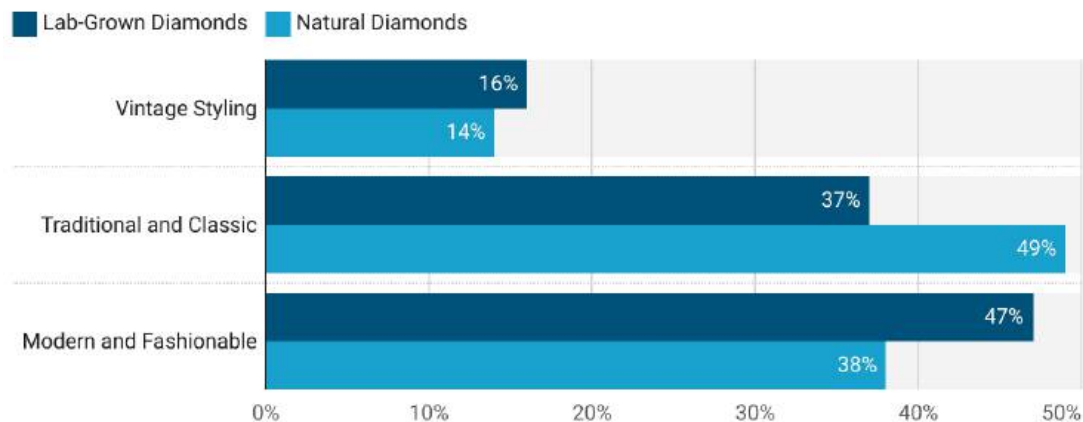
The Knot's results are in keeping with the market as a whole. Beginning in January 2023, engagement ring sales were evenly split 50/50 between natural and lab-grown diamonds (Source: Tenoris, Diamond Analytics Survey: When Will Lab-Grown Diamonds Be the Majority, 2023). And 74% of the respondents to The Plumb Club Survey 2025 indicated that they would be open to giving or receiving an engagement ring with an LGD.

Lab-grown diamonds offer a larger or higher-quality stone for the same budget compared to natural diamond which makes them attractive to younger clients who typically have less spending power. Analysis from Tenoris based on sales data from 1,300 retail stores indicates LGD sales increased 33% from December 2022 to December 2023 in the engagement ring category, all from retail prices under USD 5,000. In the USD 5,000 to USD 7,500 range, however, LGD engagement ring sales were down 26%.

Beyond cost considerations, the perception that LGDs are more environmentally friendly and ethical than natural diamonds is a significant reason for their popularity. 17% of The Plumb Club 2025 participants who would buy an LGD engagement ring considered “ethical reasons” as their primary reason for the choice.

Lab-grown diamonds are not the only fabricated gems that continue to divert market share from natural diamonds. Colored LGDs, which have a far greater differential between their cost and those of the natural variety than colorless diamonds, are increasingly popular, as is moissanite. Among the 10% of couples that opted for a non-diamond ring, close to 30% went with moissanite in 2023.

DESIGN PREFERENCES FOR LGD & NATURAL DIAMONDS



Source: <https://www.news.market.us/diamond-statistics/>

THE BRIDAL MARKET

The disruptions caused by COVID-19, which began in 2020 and persisted for years, had a lasting impact on the wedding and engagement sector of the jewelry industry.

In December 2024 earnings call, then Signet CEO Gina Drosos said, “The jewelry category is experiencing its second Covid as engagements are down 25% due to the disruption of dating three and a half years ago.”

According to research conducted by Signet, engagements are expected to increase by 25% in the coming three years, especially among the Zillennial cohort (those who straddle Gen Z and Millennial brackets). To that end, the diamond retailing giant launched a marketing campaign in Q3 2024 with De Beers, originator of the iconic “A Diamond is Forever,” that includes online and influencer content and retail collaboration.

The Knot 2023 Real Weddings Survey underscores the importance of capturing the wedding consumer: 95% of couples exchange at least one ring after getting engaged. And the size of engagement rings has climbed; one-third of engagement rings are over two carats in total, a 10% increase from 2019, according to the same survey.

On the style front, steady evolution is afoot. While round center stones remain the most popular choice (34%, down 15% since 2015), oval and pear shapes continue to climb in appeal with 23% and 8% of the market, respectively. White gold is the most frequently used metal in engagement rings (39%), but a surge in couples opting for yellow gold has challenged its supremacy (31%, up 15% from three years ago).



Photo Credits: Sabvasachi Jewellery



Photo Credits: Busatini947



Photo Credits: Grown Brilliance



Photo Credits: Lindelli



Photo Credits: Maurice Lacroix



Photo Credits: SpeakMarr

THE WATCH MARKET

The U.S. watch market generated USD 4.75 billion in revenue in 2024 and is projected to grow at an annual rate of 6.8% (CAGR 2025-2034), reaching USD 9.17 billion by 2034, according to Market Research Future. Notably, 65% of 2024's watch sales were attributed to non-luxury products, highlighting a shift toward accessibility and everyday wearability.

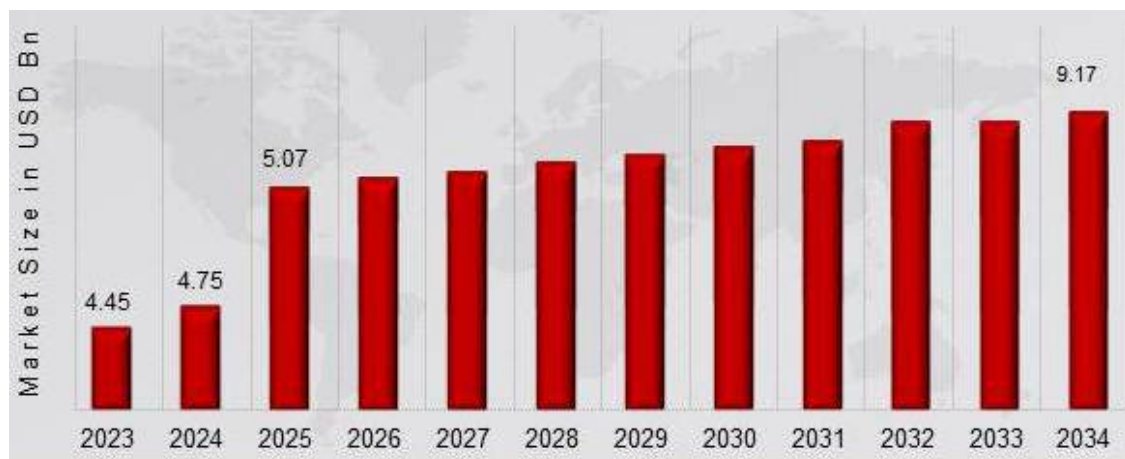
The scarcity of select brands and models during the pandemic intensified demand for pre-owned timepieces, reinforcing their status as investment-worthy collectibles. 24% of The Plumb Club Survey 2025 respondents reported owning a vintage watch, a significant rise from 17% in 2023. While some pre-owned watches have outperformed the stock market in value, a January 2025 report from Morgan Stanley and WatchCharts indicates that watch prices peaked in May 2022 and have since stabilized.

Consumer preferences are evolving, with classic watches gaining popularity, while smartwatches are seeing a decline. According to The Plumb Club Survey 2025, 58% of respondents owned a smartwatch in 2023, but that figure has now dropped to 41%. The survey also confirms that the average U.S. consumer owns three watches, reinforcing a continued enthusiasm for collecting and wearing multiple styles.

The industry is also seeing a shift in gender-fluid styling. Many women are now embracing traditionally masculine timepieces, while men are gravitating toward smaller, jeweled dress watches, blurring the lines between traditional categories. This shift is evident on the influential wrists of celebrities like Bad Bunny, Timothée Chalamet, and Jacob Elordi, whose choices reflect the growing embrace of fluidity in watch aesthetics.

As the U.S. watch market continues to evolve, heritage, versatility, and investment value remain at the core of consumer decisions. Whether drawn to the timeless appeal of classic designs, the rising vintage movement, or the shifting perception of gender-neutral styles, consumers are redefining how watches are worn and valued in an era of changing tastes and expectations.

US LUXURY WATCH MARKET



Source: <https://www.marketresearchfuture.com/reports/united-states-luxury-watch-market-21429>

U.S. JEWELRY MARKET | KEY TAKEAWAYS



U.S. JEWELRY MARKET

The U.S. jewelry market, valued at USD 77.57B in 2023, is projected to reach USD 121.78B by 2031 (5.8% CAGR). Despite economic uncertainty, fine jewelry remains a resilient investment. Consumers show price sensitivity, yet 27% plan to spend the same or more in 2025, up from 20% in 2023.



DEMOGRAPHIC DOWNSHIFT

Gen Z (and Alpha right behind) is about to come into its own as jewelry consumers.

Branded jewelry is much more important to these consumers, and they consume it at a rate much higher than their elders.



GOLD & PRECIOUS METALS

The appetite for gold jewelry is not as fulsome as the year before, resulting from the metal's significant price increases in 2024, creating a decline in the consumption of gold jewelry. Look for a shift toward designs that combine the material with others or lighten the presence of gold to keep prices within reach.

COLORED GEMSTONES

The colored gemstone market is projected to grow from USD 1.55 billion in 2023 to USD 4.64 billion by 2033, with an 11.6% CAGR, according to Access Newswire. The U.S. dominates demand, while blue sapphires lead sales. Pop culture boosts interest in vibrant hues, and birthstones remain a key consumer preference.



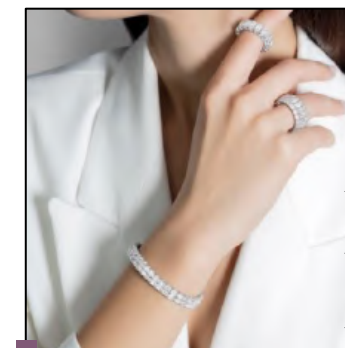
PEARLS

The global pearl jewelry market is set for strong growth, reaching US \$28B by 2033 (CAGR 11.5%), according to Custom Market Insights. Sustainability, modern designs, and rising demand among younger consumers drive interest. After supply challenges, stabilization is expected in 2025. White pearls lead, but colored pearls are gaining traction, with classic strands remaining a top choice.



NATURAL DIAMONDS

Natural diamond sales faced challenges in early 2024, with demand fluctuating. The start of 2025 indicated a more optimistic picture. In January, "sales of finished jewelry sets with natural diamonds increased by 8.4%," according to Tenoris (Feb, 2025). Consumers prioritize diamond or gemstone quality when contemplating a jewelry purchase. In The Plumb Club Survey 2025, it was the top factor that most justified the price of jewelry, according to 30% of respondents, up from 27% in 2023.



LAB-GROWN DIAMONDS

The lab-grown diamond (LGD) market is set to grow from US \$25.68B in 2024 to US \$38.86B by 2029, driven by technological advancements and rising consumer demand. The U.S. leads in sales, but challenges persist in China and India. Increasing consumer awareness and potential luxury brand adoption could reshape market dynamics.



THE BRIDAL MARKET

The wedding/engagement market started to rebound in 2024, with full recovery by 2025. Alternative stones, like moissanite and colored gemstones are gaining popularity for various reasons such as meaning, personalization and price. Fancy shape center stones continue to climb in appeal.



THE WATCH MARKET

The U.S. watch market is growing, with rising demand for classic and vintage styles. Smartwatch ownership declined from 58% (2023) to 41% (2025), while vintage watch ownership rose to 24%. Gender-fluid styling is redefining trends, with men and women embracing diverse designs. Heritage, versatility, and investment value remain key consumer priorities.



4.

THE JEWELRY & LUXURY SCENARIO OVERVIEW

THE GLOBAL JEWELRY MARKET

The global jewelry market continues to expand, fueled by rising disposable incomes, evolving consumer preferences, and increasing demand for luxury goods. In 2024, the market was valued at USD 232.94 billion and is expected to grow from USD 242.79 billion in 2025 to USD 343.90 billion by 2032, reflecting a CAGR of 5.10% over the forecast period. According to a Fortune Business Insights report, Asia Pacific led the market in 2024, accounting for a 39.28% share.

This growth is driven by accelerating urbanization in emerging economies and a shift in perception—jewelry is increasingly seen as a fashion statement and status symbol rather than something reserved for special occasions.

The gold jewelry segment, in particular, is benefiting from higher disposable incomes, increased luxury spending, and a growing demand for personalized, high-quality designs. Cultural traditions in key markets like India and China continue to fuel demand, alongside a rising preference for branded and certified jewelry, authenticated for gold purity, gemstone quality, or ethical sourcing, enhancing consumer trust and perceived value.

Regional Analysis

The Asia-Pacific region dominates the global market, accounting for approximately 59.9% of total revenue in 2023, with India and China being significant contributors to this growth (Grand View Research, Jewelry Market Size, Share & Trends Analysis Report By Product (Necklace, Ring, Earring, Bracelet), By Material (Gold, Platinum, Diamond), By Distribution Channel, By End-user (Men, Women, Children), By Region, And Segment Forecasts, 2024 - 2030). The jewelry market in China is expected to grow at a CAGR of 5.1%, while India's market is forecast to expand at 5.7%, driven by a growing middle class and deep-rooted cultural significance of jewelry in both countries (Statista, Jewelry-China report, 2024; India Jewelry Market Size & Outlook, 2024-2030).



Photo Credits: Pandora

Photo Credits: Praget

GLOBAL JEWELRY MARKET SIZE, 2024-2032



Source: <https://www.fortunebusinessinsights.com/jewelry-market-102107>



Photo Credits: Outhouse

Photo Credits: Stephen Webster

GLOBAL GOLD JEWELRY MARKET, 2024-2031



Source: <https://www.verifiedmarketresearch.com/product/gold-jewelry-market/>

In North America, the market is projected to grow at a 4.1% CAGR, due to increasing consumer demand for personalized and sustainable luxury items. E-commerce continues to play a critical role in the region's growth, allowing for more accessible purchasing options and driving innovation in product offerings (Source: Fortune Business Insights).

Europe is expected to grow at a CAGR of 4.3%, supported by strong demand for vintage designs and a rising interest in gender-neutral jewelry. The region's consumers are also drawn to sustainability and ethical sourcing, key factors that influence purchasing decisions today (SkyQuest Tech, Luxury Jewelry Market Size, Share, and Growth Analysis, 2025).

Emerging markets in Africa and Latin America are also seeing growth, led by rising incomes and increased access to luxury goods. Leading jewelry brands are expanding into these regions, recognizing their potential for long-term market share (Grand View Research, Latin America Jewelry Market Size & Outlook, 2024-2030; Middle East & Africa Jewelry Market Size & Outlook).

Major Players and Market Share

Several key players dominate the global jewelry market, including Tiffany & Co., Pandora, Chow Tai Fook, Louis Vuitton SE, and Richemont. These companies hold substantial market shares due to their global brand recognition and innovative strategies. According to Grand View Research, these brands are focusing on geographic expansion, particularly in Asia, while also embracing sustainability initiatives to appeal to socially conscious consumers.

For example, Pandora has successfully capitalized on the personalization trend, offering affordable, customizable jewelry that resonates with younger generations. Their focus on expanding their digital presence has also allowed them to capture a wider audience (Fortune Business Insights).

Consumer Preferences

Changing consumer preferences are significantly shaping the jewelry market. Customization and personalization are increasingly important as buyers seek unique pieces that reflect their personal stories or milestones (Polaris Market Research). As sustainability becomes a core value for consumers, the demand for ethically sourced materials and transparent supply chains is also rising. Generation Z and Generation Alpha are particularly vocal in their preference for brands that prioritize environmental and social responsibility (Statista).

The rapid growth of e-commerce continues to transform how consumers shop for jewelry. According to Jewels360.com, global online jewelry sales are expected to have increased by 13.1% in 2024, with the market expected to reach \$115.4 billion by 2029. Digital platforms are enhancing the shopping experience by offering personalized services, virtual try-ons, and an expanded selection of products. Additionally, shifting consumer preferences reflect broader cultural trends, with rising demand for gender-neutral and vintage-inspired designs driven by a growing emphasis on inclusivity and nostalgia (Matter of Form).

Conclusion

The global jewelry market is on track for sustained growth, driven by evolving consumer behaviors, technological advancements, and the expansion of key markets, particularly in Asia-Pacific. Major players are responding to trends like personalization, sustainability, and the rise of e-commerce to better connect with a new generation of buyers. As consumer preferences continue to shift, companies will need to stay agile, leveraging innovation and ethical practices to maintain their competitive edge in this dynamic market.

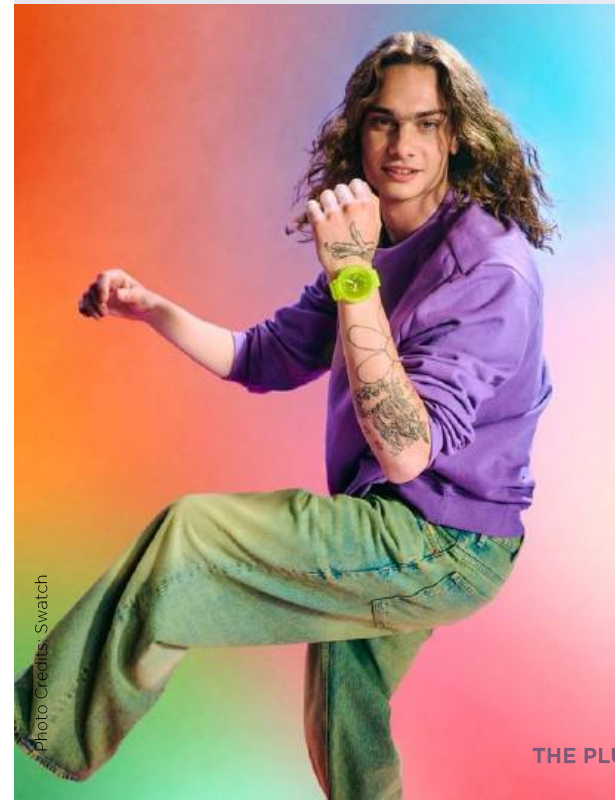




Photo Credits: Tasaki

Global Jewelry Market Key Takeaways and Plumb Club Market Research Comparisons

- Market Growth:** The 2023 report projected the global jewelry market to grow at a CAGR of 8.5%, with the market size reaching USD 482.22 billion by 2030. The 2025 report estimates indicate more moderate growth, with a projected CAGR of 5.1%, reflecting slightly adjusted expectations in the post-pandemic economy.
- New Trends:** Both the 2023 and this report, underscore the growing importance of sustainability and inclusivity. For the 2023 report, the focus was on lab-grown diamonds and alternative materials like titanium, reflecting progressive innovations. For the 2025 report, the emphasis continues with sustainable practices but also notes the increasing importance of personalization and modular design in consumer preferences.
- Generational Shifts:** In the 2023 report, the growing relevance of Millennials and Gen Z was central, particularly with their demand for ethically sourced, unique designs. The 2025 report reiterates the influence of these younger consumers but adds that their growing preference for personalized jewelry and digital-first shopping experiences is shaping the market further.
- Gender Inclusivity:** The 2023 and 2025 reports mention the rising acceptance of gender-fluid jewelry, with the 2023 focus on men's jewelry expanding to include a broader spectrum of inclusivity. By 2025, the report strongly emphasizes this trend as a key driver of growth, with unisex designs and inclusivity becoming central to consumer demand.

While the 2023 report highlighted optimism about a post-pandemic recovery was pronounced, the 2025 report's projections are more nuanced. They reflect ongoing economic challenges but acknowledge strong demand, especially driven by younger, tech-savvy consumers.



5. PHYGITAL RETAIL TRENDS
INSTORE & DIGITAL SALES



Photo Credits: Tiffany & Co

THE PHYGITAL EXPERIENCE

Consumers today are deeply familiar with maintaining relationships through decentralized, 24/7 communication channels like Zoom, Instagram, and WhatsApp. They expect the same flexibility and accessibility when interacting with brands. This demand has propelled the rise of “phygital” retail, which seamlessly integrates physical and digital shopping experiences. A strong omnichannel strategy is essential, enabling retailers to create multiple touchpoints with their audience.

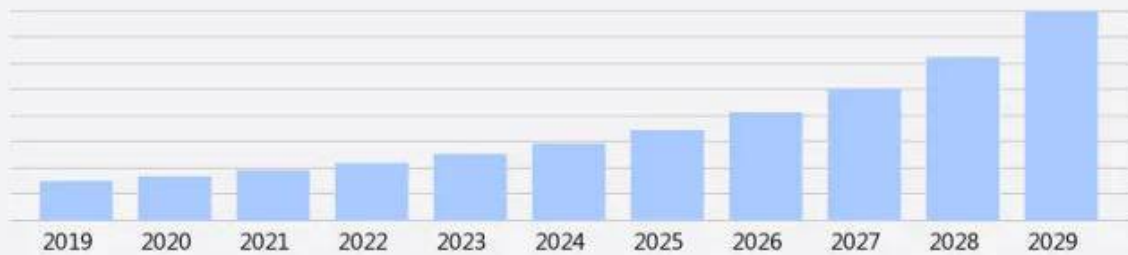
For instance, shoppers often research items online before purchasing in-store, or vice versa. Bridging these experiences effortlessly ensures brand loyalty. Jewelry retailers that facilitate smooth, connected transactions across in-person and digital platforms stand to benefit significantly. With the global online jewelry market projected to reach USD 64.12 billion by 2026 (and already surpassing USD 7.5 billion in the U.S.), the digital realm offers immense opportunities. Millennials, responsible for 30% of online jewelry purchases, conduct 63% of their jewelry shopping online, making them a key demographic. Meanwhile, 29% of Gen Z consumers still prefer the tactile, in-store shopping experience (Source: Statista).

17% of millennials prefer to shop for jewelry mostly in-store. Overall, 55% of millennials bought jewelry in the past 12 months, exceeding Gen X (41%) and baby boomers (33%).

Physical stores now play an expanded role beyond sales. They serve as spaces to experience a brand’s culture through events like pop-up wine tastings or book signings. These in-person interactions allow staff to personalize customer service by learning individual preferences, such as ring sizes and upcoming special occasions. These insights carry over into digital conversations, reinforcing long-term relationships.

The market is also evolving with innovations in jewelry design and technology, meeting growing consumer demand for personalized pieces. Retailers adopting omnichannel strategies can cater to changing preferences, offering convenience, expertise, and memorable experiences. Despite the rise of e-commerce, the tactile allure of in-store shopping remains valuable, underscoring the importance of blending digital and physical touchpoints. As the market expands, brands that embrace these trends will thrive.

GLOBAL ONLINE JEWELRY MARKET, 2024-2029



2019 : USD 23.60



17.8%
2025 Year-over-Year



ACCELERATING
Growth Momentum



22.1%
CAGR 2024-2029



USD 78 Bn
Incremental growth
between 2024-2029

Source: newsroom.technavio.org

RETAIL IMAGINATION

AI-Powered Operations and Merchandising

As 2025 unfolds, artificial intelligence is transforming retail by optimizing behind-the-scenes operations, refining inventory management, and improving sales forecasting. AI-driven solutions are revolutionizing merchandising assortments, ensuring that businesses can respond dynamically to consumer demand while reducing inefficiencies.

Advanced AI models, including predictive analytics and machine learning algorithms, enable retailers to anticipate sales trends with remarkable accuracy. By analyzing vast amounts of real-time data, ranging from historical sales records to market trends and consumer behaviors, AI helps businesses determine which jewelry pieces will resonate most with their clientele. This minimizes overstocking, reduces markdowns, and improves overall profitability.

AI-powered tools are also redefining merchandising strategies. Dynamic assortment planning leverages AI to suggest optimal product mixes based on regional preferences, seasonal demand, and emerging style trends. Automated inventory tracking systems further refine stock replenishment, ensuring that bestsellers remain available while preventing excess stock of slow-moving items.

For consumers, AI enhances personalization by refining product recommendations based on browsing history and past purchases. Retailers can integrate AI-driven insights into digital storefronts and in-store experiences, creating a seamless omnichannel approach that strengthens customer loyalty.

Beyond sales and merchandising, AI also plays a vital role in quality control. High-resolution AI-assisted imaging can detect microscopic flaws in jewelry and watches, ensuring precision and reducing human error in quality assurance. Additionally, AI-driven chatbots and virtual assistants provide real-time customer support, enhancing engagement and streamlining purchasing decisions.

As generative AI evolves, its ability to process unstructured data and generate dynamic visuals—such as realistic virtual models and 3D jewelry designs—will further optimize product development and enhance customization. In this data-driven landscape, AI is not just an operational tool but a strategic asset, empowering retailers to navigate the complexities of modern commerce with agility and precision.



TECHNOLOGICAL INNOVATIONS

Technologies that blur the line between digital and physical spaces, once the realm of science fiction, are transforming consumer goods to enhance service and educate clients.

Augmented reality (AR), familiar to Instagram filter users, overlays digital content in real-world settings. In the jewelry market, AR enables clients to interact with products via apps, virtual showrooms, and other tools, allowing them to try on pieces without stepping into a boutique. This game-changing feature democratizes access to fine jewelry, removing barriers for those intimidated by its elitist image. AR also aids time-starved shoppers who can experiment with luxury at their convenience. For retailers, AR reduces returns from customers whose expectations were shaped by static images rather than dynamic interactions.

Customer feedback also underscores AR's value: a Deloitte Digital survey found brands with custom AR experiences were 41% more likely to attract clients, with 75% of respondents willing to pay more for products they could explore via AR.

Virtual reality (VR), while related to AR, immerses users in a fully constructed environment. Using headsets, users experience sensory-rich, imaginary worlds. For instance, Chanel's traveling VR exhibit transported guests to a Paris ballroom, showcasing the brand's craftsmanship and reinforcing its legacy.

Some of the jewelry industry's most influential names make use of these technologies to connect with existing and potential clients. With a special AR lens, Cartier enables clients to virtually try on a selection of its most iconic items, the Love bracelet and Tank Française watch among others, on social media app Snapchat, to give them a vivid sense of how a piece would look on their wrists. Chanel offers a similar feature through its website, extending the chance to virtually "wear" and photograph oneself wearing watches, rings, earrings and curated stacks of bracelets.

Meanwhile, by uploading a photo of their hands, users of Brilliant Earth's app can get an image of any of the brand's rings on their fingers, sized to the correct scale. The app also permits users to adjust the carat weight of the rings pictured.

Gucci's Chengdu store featured AI-generated art, blending imagery from Florence and the Chengdu mountains, tying its heritage to local culture.

From AR try-ons to immersive VR and AI-powered storytelling, emerging technologies are reshaping how jewelry brands engage customers. With limitless applications, the future of consumer interaction is just beginning.

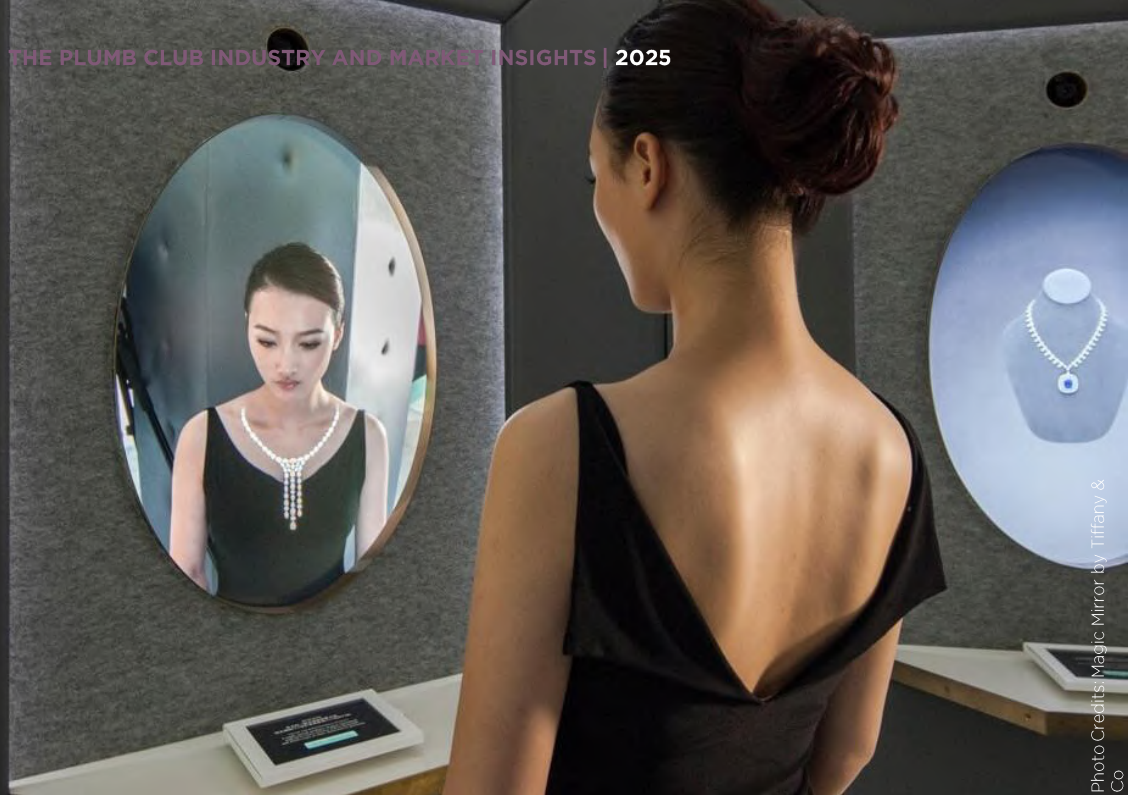


Photo Credits: Magic Mirror by Tiffany & Co



Photo Credits: WatchPro

OMNICHANNEL STRATEGIES

During the COVID-19 pandemic, while much of the world shifted its focus to staying home, the jewelry industry embraced a new era of digital connectivity. The evolving reliance on online communication accelerated innovation in client engagement, pushing retailers to explore and adopt every possible method to stay connected. As brick-and-mortar stores temporarily closed, brands pivoted swiftly, transforming challenges into opportunities to strengthen their digital presence and reimagine customer relationships.

From mom-and-pop shops to national department stores, omnichannel outreach, WhatsApp chats, Instagram DMs, personal shopping services and the rest, became the key to staying afloat while their physical doors were closed. The jewelry market rebounded in spectacular fashion thanks to the nonstop effort, a pent-up urge to shop, and the need for earrings to jazz up otherwise drab video conferencing. The following year, 2021, was the best year ever for jewelry sales, and the market for online jewelry purchases had transformed. In 2019, online jewelry sales accounted for 13% of the market (Source: McKinsey State of Fashion: Watches and Jewellery). By 2023, online sales had grown to approximately 29.2% of total category retail sales, reflecting an industry-wide digital transformation (Source: Digital Commerce 360). Projections for 2025 estimate online jewelry sales will reach USD 122.5 billion, comprising 18-21% of the global market (Source: Oberlo). This surge highlights a fundamental shift in how consumers engage with a traditionally tactile product category as customization and digital marketing continue to reshape the jewelry shopping experience.

Even now, with a return to normalcy, clients expect the accessibility and ultra-personalized service to which many have become accustomed.

Jewelry is often connected with emotionally resonant moments, the engagement, the milestone anniversary, the new job. Professionals in the category are used to connecting with clients to a deeper degree than the typical purveyor of other gifting or self-affirming items. Cultivating knowledge of clients' habits through a CRM (Customer Relationship Management) system allows retailers to send personalized recommendations through their online channels, frequently triggering sales. After receiving customized recommendations online, email and text, at least 49% of consumers made unplanned purchases (Source: Invesp).

Mobile accessibility remains a key pillar of omnichannel strategy, though precise engagement metrics vary by region. Globally, mobile devices account for approximately 58-63% of web browsing sessions, with the U.S. at around 43%. As for retail behavior, in the third quarter of 2024, smartphones were responsible for over three-quarters of retail site visits in the United States and generated roughly two-thirds of online purchase orders. Given this significant share of traffic and transactions, optimizing content for mobile devices is essential. Retailers must ensure that product pages, digital messaging, and purchasing processes are seamless across smartphones and tablets, offering an uninterrupted and engaging user experience.

The omnichannel approach extends beyond digital engagement to fulfillment. Today's consumers expect flexible delivery and pickup options that cater to their convenience. A significant 66% of shoppers report that the availability of multiple fulfillment options influences their decision to complete a purchase (Source: Digital Commerce 360). To meet these expectations, retailers should continue offering services such as in-store pickup for online orders, messenger delivery, curbside pickup, and a variety of shipping choices. When implementing curbside pickup and other fulfillment methods, businesses should also consider security measures to ensure a safe and seamless customer experience. Providing multiple fulfillment methods not only enhances customer satisfaction but also reinforces loyalty in an increasingly competitive market.



Photo Credits: Pandora



Photo Credits: Guernsey



Photo Credits: Swarovski

6.



MARKETING NEW FRONTIERS

EXPERIENTIAL CONSUMPTION

THE NEW ERA OF MARKETING

The Importance of Brand Experience & Storytelling

As we navigate an era of global uncertainty, engaging clients on an emotional level has never been more crucial. Generative AI is revolutionizing how brands connect with their audiences, generating images, videos, and personalized content that democratizes creativity and transforms brand storytelling.

Leading the charge in AI adoption are luxury brands such as Louis Vuitton, Moncler, and Valentino. These brands leverage AI for demand forecasting, counterfeit detection, and crafting compelling campaigns that preserve heritage craftsmanship, while embracing co-created creativity.

Even in the digital age, physical stores remain a cornerstone of the jewelry industry. Luxury brands such as Tiffany & Co. and Cartier have redefined in-store experiences by creating immersive, high-touch environments where clients can explore collections with expert guidance. Whether through private appointments, bespoke design consultations, or thoughtfully curated store layouts, these spaces foster meaningful connections that reinforce brand prestige.

Storytelling remains at the heart of this approach, transforming product discovery into an engaging, emotionally resonant journey.

Beyond traditional retail, experiential marketing plays a pivotal role in deepening customer relationships. Hosting exclusive event, such as private trunk shows or collection launches, provides high-value clients with intimate, tailored brand interactions. These events not only offer the opportunity to engage with the jewelry firsthand but also reinforce exclusivity and craftsmanship. Additionally, pop-up boutiques continue to gain momentum, offering immersive brand experiences in unexpected locations. These temporary spaces generate excitement, attract new clientele, and reinforce a brand's dynamic presence in the market.

In an increasingly competitive landscape, brand experience and storytelling are the key differentiators. By blending heritage with innovation and fostering genuine connections, jewelry brands can cultivate loyalty and create memorable moments that transcend mere transactions.



Photo Credits: Bea Bongiasca



Photo Credits: Tiffany & Co.



Photo Credits: Bvlgari

INFLUENCER MARKETING

The Power of Social Media in the Jewelry Industry

Long-term influencer partnerships have a profound impact on brand credibility, particularly for jewelry brands. By fostering ongoing relationships, brands can produce consistent, authentic content that deeply resonates with followers. Companies like Mejuri, Astrid & Miyu, Regal Rose, Purely, have leveraged influencers to establish brand credibility and foster an organic following, leading to sustained engagement and sales growth.

Micro-influencers are emerging as potent allies for jewelry brands. With their smaller yet more engaged followings, they offer a more intimate connection with their audience, enabling highly targeted campaigns that feel personal and authentic.

Visual social platforms like Instagram and Facebook are ideal for the jewelry industry, where aesthetics and storytelling are key components of the brand's identity. Successful social media campaigns are able to communicate that each piece of jewelry has a story behind it—whether it's the inspiration, the craftsmanship, or the emotions it symbolizes. By highlighting these stories through visually engaging posts, videos, and stories, brands can create emotional connections with consumers.

Interactive content, such as polls, quizzes, and virtual try-ons, further boosts engagement. These features entertain followers and provide valuable insights into customer preferences.

Hashtags and user-generated content also play a crucial role in expanding reach. By encouraging customers to share photos of themselves wearing a brand's jewelry, companies can create a sense of community and authenticity. Well-structured hashtag campaigns help these posts gain visibility beyond the brand's follower base driving organic engagement.

In the highly competitive world of jewelry, an effective social media strategy can elevate a brand, increasing its visibility and credibility while fostering meaningful connections with its audience.



Photo Credits: Dior High Jewelry



Photo Credits: Pandora

Photo Credits: De Beers

THE MOST BRILLIANT AD CAMPAIGN



A DIAMOND IS FOREVER

7.

SUSTAINABILITY

FOCUS





Photo Credits: Allighieri

“ 39% OR RESPONDENTS INDICATED THAT THEY WOULD BE MORE LIKELY TO BUY A PIECE OF JEWELRY FEATURING RECYCLED METAL.”

Source: The Plumb Club Survey 2025



Photo Credits: Denise Cassou Couture

CIRCULAR ECONOMY MODEL

Producing jewelry with recycled precious metals and reusing gems has become pervasive in the jewelry industry among brands of every size and price point. Recycling and upcycling are valued among many consumers because of their concern for the environment. During the last five years, 89% of consumers worldwide have altered their habits to buy more sustainable products (Source: Statista). The use of recycled metal radically decreases environmental impacts. Emissions from sourcing recycled silver are one-third of those from mined silver; recycled gold reduces emissions by 99% (Source: World Gold Council).

Consumers often see recycled content as a boon. In The Plumb Club Survey 2025, 39% of respondents indicated that they would be more likely to buy a piece of jewelry featuring recycled metal.

Brilliant Earth was indeed ahead of the curve, starting its commitment to sustainable practices in 2006 by using recycled precious metals in its jewelry. By 2023, the brand had reached 96% recycled gold and 97% recycled silver in its pieces. Chopard, made headlines in 2018 by announcing its goal to use 100% responsibly sourced gold in all its luxury jewelry and watches, positioning itself as a leader in sustainability within the luxury sector. As for Pandora, the world’s largest jewelry company by units sold, it pledged in 2020 to use only recycled silver and gold by 2025. By 2024, Pandora had already met this goal, sourcing 100% of its silver and gold from certified, responsible refiners. So, while Chopard made a notable announcement in 2018, both Brilliant Earth and Pandora were ahead in their sustainable sourcing initiatives, with Brilliant Earth leading the way since 2006 and Pandora meeting its 2025 target ahead of schedule.

Recycling isn’t confined to precious metals. Savvy watch brands have made use of sustainable and recycled materials that also serve as distinctive design features, creating a constant visible reminder of their eco-conscious bona fides. Standout, design-forward features—like the multicolored dials formed from recycled PET plastic in the Upcycle from Oris—are persistent reminders that those elements were made with sustainable materials and provides a halo of ethical behavior that encompasses the brand and its customers.

CERTIFICATIONS & STANDARDS

The landscape of sustainability certifications and standards in the jewelry industry remains highly fragmented, with various entities addressing different aspects of ethical sourcing, environmental responsibility, and product integrity. Some standard-setting organizations or processes, such as the Responsible Jewellery Council's (RJC) Code of Practices, to which all Plumb Club Members adhere, set comprehensive guidelines for the entire supply chain, while others, like the Kimberley Process Certification Scheme and Fairtrade Gold Certification, validate the ethical sourcing of specific materials. Additionally, luxury brands and large jewelry conglomerates often implement proprietary standards to reinforce their commitment to responsible business practices.

Beyond sustainability, reports and certifications play a critical role in verifying a product's authenticity and quality, providing consumers with tangible proof of value. Certificates of authenticity, gemological lab reports, and retailer-issued warranties serve as essential documentation that enhances trust and confidence in a purchase. These certifications not only confirm a gemstone's characteristics, such as cut, clarity, and origin, but also validate that a piece has met industry-recognized standards.

The demand for transparency is growing. According to a survey by Rare:Group, 63% of consumers consider ethical and sustainable business practices, such as fair trade, carbon footprint reduction, and waste recycling, key factors in brand loyalty. The importance of independent certification is further underscored by The Plumb Club Survey 2025, where 93% of respondents indicated that a certificate or verification report—whether from an independent lab, appraiser, or brand, was a decisive factor in their purchasing decisions. Notably, while 59% of consumers still purchase highly desirable items without verifying responsible sourcing, this figure has declined by four percentage points since 2023, highlighting a shift toward more conscientious buying behaviors.

In a market where greenwashing remains a concern, rigorous certifications act as trust signals, allowing retailers to differentiate themselves and reinforce their credibility. As Millennials and Gen Z consumers increasingly prioritize corporate integrity and sustainability, certification-backed transparency will remain a powerful tool in driving consumer confidence and long-term loyalty.



Photo Credits: Chopard



Photo Credits: Bonicoste

CONSUMER AWARENESS AND DEMAND



Photo Credits: Michael Hill



Photo Credits: MATILDE Sustainable Jewellery @matildejewellery



Photo Credits: Roberta Do Rio



Photo Credits: Live Diamonds

In its report “State of Fashion: Watches and Jewellery,” McKinsey & Co. projects that “purchases influenced by sustainability practices will triple in the years ahead, presenting an opportunity for the industry to make real, tangible strides toward important environment and social imperatives.” That research is borne out by data indicating consumers are increasingly interested in environmentally mindful forms of consumption. The Plumb Club Survey 2025 found that 83% of respondents would pay “at least a moderate amount more” for ethically sourced jewelry. Further, according to a 2022 survey of US consumers conducted by Platinum Guild International USA, 40% of clients have conversations with their jeweler’s surrounding sustainability, including details about how a piece was made, the sourcing of materials, and the quality of an item’s construction.

Beyond focusing exclusively on the materials, consumers are also increasingly sensitive to the working conditions of the people responsible for bringing raw materials used in jewelry to market, particularly as they learn more about the potentially dangerous nature of mining work. Discussion of sustainability extends to the totality of conditions affecting the jewelry supply chain.

The impact of this thinking permeates the jewelry and watch industry in all of its processes. Using recycled or ethically produced gold has become pervasive in the jewelry industry among brands of every size and price point, and they promote that fact widely to reassure consumers of their environmental awareness.



8.

CONSUMER INSIGHTS

EMERGING PHENOMENA

JEWELRY BEYOND GENDER

The NO GENDER Generation



Photo Credits: Chaumet



Photo Credits: @sarchanaharani



Photo Credits: Louis Vuitton

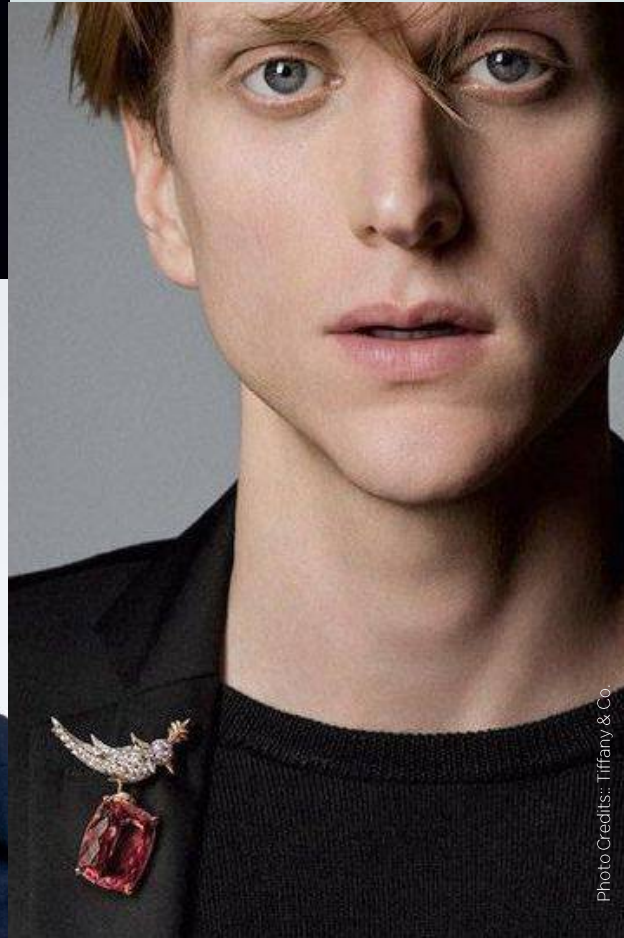


Photo Credits: Tiffany & Co.

The “No Gender” trend in luxury jewelry marks a departure from traditional classifications, embracing fluidity and inclusivity. As identity becomes more personal and less defined by rigid labels, particularly among Gen Z, brands are moving away from gendered collections in favor of designs that resonate with self-expression. Instead of aligning pieces with a specific audience, luxury jewelry now prioritizes emotional connection, craftsmanship, and individual storytelling.

This shift is also reflected in the way men are reclaiming jewelry categories once considered feminine, as brooches, tennis bracelets, and layered necklaces, are making a strong comeback in men’s styling, blurring historical distinctions. Boucheron’s New Maharajahs collection exemplifies this evolution, reinterpreting historical opulence without gendered constraints, while other brands continue to embrace versatility and personal style over predefined categories.

The digital sphere further accelerates this shift, with virtual identities allowing for limitless self-representation. The rise of the “Avatar Market” in luxury fashion highlights how identity is becoming increasingly fluid, merging digital and physical realms to expand avenues for self-expression.

In this era of transformation, jewelry is no longer just an adornment—it’s a powerful medium for authenticity and freedom, reflecting the evolving ways people define themselves in a world without boundaries.

THE FLAT AGE SOCIETY

Embracing Age-Fluidity

Age-fluidity in the luxury and jewelry industry represents a significant shift away from traditional demographic-driven marketing, embracing a more inclusive approach that transcends age boundaries. Historically, luxury brands have catered to specific age groups, often focusing on the older, wealthier clientele, while gradually pivoting toward younger generations like Gen Z and Alpha. However, age-fluidity challenges these conventions.

Broader societal shifts toward inclusivity and diversity, which are reshaping consumer expectations, underpin the trend. Global demographic changes, the increasing number of older adults in the West, booming youth demographics in regions like South and Southeast Asia, require that luxury brands appeal to more diverse age ranges. Age-fluidity recognizes that people of all ages seek luxury experiences, and their tastes and preferences cannot be pigeonholed into narrow age brackets.

As a result, designs and marketing campaigns must resonate across generations. Rather than segmenting collections by age, brands are focusing on timeless pieces that hold universal appeal, offering designs that transcend age-specific trends. This approach caters to a wide spectrum of personal expressions and ideals, allowing individuals to embrace styles that feel authentic to them regardless of their life stage. By focusing on versatility, luxury brands create pieces that are adaptable to different tastes, contexts, and cultural references, thereby speaking to both youthful and more mature sensibilities. Rather than adhering to one narrow aesthetic, brands are embracing a fluid approach that allows customers to find resonance and meaning in designs that celebrate both individual and shared experiences.

Traditional demographic categories like age and income are becoming less useful for understanding luxury consumers. Instead, psychographic research, which focuses on values, interests, and behaviors, provides deeper insights.

Luxury purchasing is no longer just about wealth or age; it is about personal identity and how a brand fits into a consumer's lifestyle and cultural preferences. Brands that adapt to this shift will be better positioned to connect with a broad and diverse audience.



Photo Credits: Outhouse



Photo Credits: Karen Walker



Photo Credits: LELET NYC



Photo Credits: Paula Mendoza

CULTURAL OSMOSIS

A New Era of Global Influence

In today's interconnected world, the jewelry industry is experiencing a profound transformation driven by "cultural osmosis." This concept reflects the fusion of diverse global traditions and modern aesthetics into a unified yet multifaceted narrative. From New York to Shanghai and Mumbai to London, digital tribes are forming, bound by shared values and creative expression rather than geography. Social media serves as a catalyst, showcasing the fluid exchange of cultural styles and redefining jewelry as a vibrant dialogue of individuality.

This global connectivity has led to the dissolution of traditional norms. Jewelry, once a symbol of heritage and status, has evolved into a dynamic canvas for self-expression. It is now a medium that bridges personal identity with cultural dialogue, embracing edgy, unconventional designs that celebrate diversity and innovation.

The rise of street style further highlights this shift, as adornments like tattoos, piercings, and layered jewelry speak to identity and individuality. Modern design draws inspiration from ancient traditions, weaving them with contemporary influences to create immersive and meaningful pieces. Chunky rings, ear-party arrangements, and layered necklaces embody this transformation, offering a tactile reflection of a shifting, interconnected society.

In this era, jewelry goes beyond mere ornamentation, embodying creativity, craftsmanship, and personal storytelling, marking a new age of cultural influence and global resonance.



Photo Credits: Sabyasachi Jewellery



THE NEW CONSUMER

The Rise of Gen Z and Alpha

The rise of personalization in luxury jewelry is driven by Gen Z's embrace of self-expression and rejection of traditional norms. As the dominant force in consumer culture, Gen Z prioritizes unique, customizable pieces that reflect fluid identities. This demand is reshaping how brands approach design, inspiring adaptable collections that empower consumers to curate personal looks. Social media platforms like TikTok and Instagram amplify this trend, making self-styling an aspirational and influential movement.

While Gen Z is leading the shift, a new generation is emerging as a key cultural influencer, Gen Alpha (ages 10-14). Much like in the beauty industry, where "Sephora Kids" are shaping trends despite not being the primary consumers, Gen Alpha plays a crucial role in guiding their Millennial parents' purchasing decisions. With unparalleled access to social media, they absorb trends through TikTok videos, celebrity endorsements, and influencer content, introducing their parents to new aesthetics, brands, and cultural movements. This influence extends to luxury jewelry, where aspirational styling, viral trends, and digital-first discovery are redefining consumer behavior.

Sustainability and transparency remain key across generations. Both Gen Z and Alpha value ethical sourcing and responsible production, prioritizing quality over mass production. Having grown up amid climate concerns, they expect brands to align with their values of environmental and social responsibility.

As luxury evolves, the next era of jewelry will be defined by individuality, sustainability, and adaptability. Understanding how Gen Z is shaping the market today, and how Gen Alpha's influence is accelerating these shifts, will be crucial for brands looking to stay ahead in an increasingly dynamic industry.



Photo Credits: Supersmall



Photo Credits: Pinterest



Photo Credits: Guzema



Photo Credits: Niche Jewellery



THE JOYCONOMY

How Jewelry is embracing Playful Escapism

As the global polycrisis deepens, people are craving joy and escapism more than ever, seeking relief from hyper-rational, productivity-driven lifestyles. A recent VML study surveying 3,000 consumers across the US, UK, and China, reveals that 83% are actively searching for happiness and playfulness in their lives. In response, the luxury and jewelry markets are aligning with this trend, tapping into emotional landscapes to offer more lighthearted, fun-filled experiences.

In 2023, GQ dubbed this the "era of fun watches," with traditional watchmakers like Rolex, Blancpain, and Audemars Piguet embracing playful designs, from emoji dials to superhero themes. Tiffany & Co. also ventured into this joyful space, collaborating with Daniel Arsham Studios to release a Pokémon-themed fine jewelry collection, while teaming up with Snap to create an AR-led gamified experience at the US Open.

Consumers, fatigued by the relentless cycle of "doom-and-gloom" news, are seeking immersive experiences that offer both whimsy and emotional reconnection. These desires are driven by nostalgia for more opulent, carefree times, as well as a growing hunger for theatrical extravagance. Jewelry brands are responding by designing products and experiences that cater to these thrill-seeking, emotionally charged moments.

Radha Agrawal, CEO of Daybreaker, underscores this shift, emphasizing that brands must "emotioneer" their offerings. She believes that embedding joy into company culture, with "tears of joy" as a key metric, is essential to meeting this demand for deeper, more emotive experiences.

In 2025, the jewelry industry will continue to innovate, offering products that do more than adorn—they provide a much-needed escape into joy.



Photo Credits: Swatch

THE IMPACT OF VINTAGE JEWELRY

Quality and Design

Vintage jewelry captivates modern consumers with its unique blend of craftsmanship, heritage, and sustainability. Amid an era dominated by mass production, vintage pieces stand out as rare treasures, often handcrafted with exceptional detail and quality. These timeless designs evoke a sense of individuality, offering a meaningful alternative for those seeking to express personal style.

Nostalgia, driven by a desire for a “kinder/gentler” time, further fuels the allure of vintage jewelry. In today’s fast-paced world, there’s a growing yearning for simplicity and authenticity, which vintage pieces offer in abundance. As society navigates uncertain times, the rich history embedded in these items provides a comforting connection to the past, evoking a sense of stability and continuity. Younger generations, such as Millennials and Gen Z, are drawn to the cultural significance and stories these items carry, finding beauty in their historical resonance. This desire for a more nostalgic, serene era is reflected in the preference for vintage design elements or “old world” techniques, which emphasize slower craftsmanship, timeless elegance, and enduring beauty.

Sustainability is another key driver of the vintage jewelry market. By participating in the circular economy, consumers give new life to pre-owned items, reducing the environmental impact of mining and production. This aligns with a growing preference for eco-friendly and ethically sourced choices.

The enduring value of vintage jewelry also positions it as an investment. High-quality pieces, especially from renowned brands, often appreciate over time, merging aesthetic pleasure with financial wisdom. Additionally, the expansion of digital marketplaces has made vintage jewelry more accessible, bolstering its popularity.

Vintage jewelry’s timeless appeal, intricate craftsmanship, and sustainable ethos solidify its relevance, celebrating design excellence while connecting past and present.



Photo Credits: @bonham1793



Photo Credits: @garchanathani



CONSUMER INSIGHTS | VINTAGE JEWELRY

Photo Credits: For Future Reference Vintage



Photo Credits: @antiquegoldbigg



Photo Credits: Pebble Smart Ring



Photo Credits: Totwoo

TECHNOLOGICAL ADVANCES

The Future of Wearable Tech

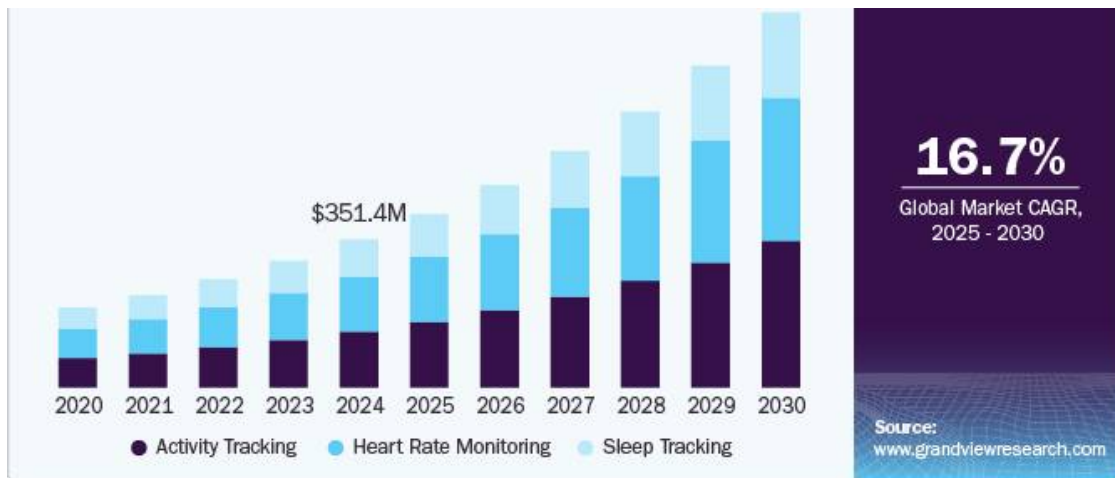
Technological innovations are reshaping the jewelry industry, merging aesthetics with functionality to redefine accessories as tools for wellness, connectivity, and self-expression. In an era of economic shifts and evolving consumer expectations, smart jewelry is leading the way, enhancing both personal style and everyday efficiency.

Embedded with advanced features, smart rings, bracelets, and pendants now track heart rates, sleep cycles, stress levels, and body temperature. Devices like Pebble's Iris smart ring, launched in India in September 2024, offer stainless-steel construction, smart touch controls, and continuous health monitoring, catering to the growing demand for wellness technology. The expanding market for wearable electronics—driven by increased smartphone penetration, rising disposable incomes, and a heightened focus on health, positions smart jewelry as a category poised for significant growth.

Playful, interactive designs, such as a clip-on furry robot showcased at CES 2025, highlight the creative potential of this fusion. Meanwhile, industry giants like Apple are investing in smart rings with capabilities ranging from health tracking to gesture-based controls, signaling the category's rapid evolution.

As consumers embrace the Internet of Things (IoT) and real-time biometric data tracking, smart jewelry is becoming indispensable. These wearables not only enhance well-being but also offer new avenues for personalization and exclusivity, bridging innovation with emotional significance. By seamlessly integrating technology with fine craftsmanship, the future of jewelry is more connected, intuitive, and dynamic than ever.

SMART JEWELRY MARKET, 2025-2030



Source: <https://www.verifiedmarketresearch.com/product/gold-jewelry-market/>

CONSUMER INSIGHTS | KEY TAKEAWAYS



NO GENDER

The "No Gender" trend in luxury jewelry embraces fluidity and personal expression beyond traditional gender norms. With Gen Z leading the shift, brands like Boucheron are reimagining collections to prioritize individuality and emotional connection, marking a transformative move towards more inclusive, genderless fashion in both physical and digital spaces.



AGE-FLUIDITY

Age-fluidity in luxury and jewelry challenges age-based marketing by embracing inclusivity and transcending traditional demographics. It focuses on creating timeless designs and campaigns that resonate with all generations, reflecting personal identity over age. This trend aligns with psychographic research, allowing brands to innovate and connect with diverse global consumers.

CULTURAL OSMOSIS

Jewelry is evolving through "Cultural Osmosis," where global influences blend into a unified yet multifaceted aesthetic. Driven by digital communities, this trend celebrates individuality and self-expression. Jewelry now serves as a canvas for cultural dialogue, combining traditional craftsmanship with modern innovation to create meaningful, personalized pieces.



THE NEW CONSUMER

The rise of personalization in luxury jewelry, driven by Gen Z and Gen Alpha, reflects a shift toward self-expression, transparency, and sustainability. Amplified by social media, these tech-savvy generations demand customizable, eco-conscious pieces, shaping their own and Millennial parents' purchases, redefining luxury as individuality and futuristic design.



HYPER PERSONALIZATION

The personalization trend in luxury jewelry is driven by Gen Z's desire for authentic self-expression and rejection of traditional norms. "Ensemble mania" encourages mixing pieces for unique looks, reflecting fluid identities. Social media amplifies this shift, pushing brands to create adaptable, customizable designs for individual creativity.



INNOVATIVE MATERIALS

Innovations in sustainable and alternative metals are broadening designers' creative possibilities, allowing for bold, avant-garde creations.

These materials offer durability and a modern aesthetic, appealing to younger, trend-savvy consumers.



9.

DESIGN DIRECTIONS 2025



DESIGN DIRECTIONS 2025 | INTRODUCTION

Innovation in jewelry design signals a vibrant evolution in the realm of adornment, where historical influences meet contemporary creativity. Emergent trends exhibit a sophisticated fusion of nostalgia and modernity in a world that celebrates individuality. From the resurgence of vintage aesthetics to the rise of personalized designs, the jewelry landscape is poised to captivate and inspire with its diverse and transformative styles.

These developments herald a bold revival of the 70s and 80s aesthetics, reflected in smooth, rounded metals, glossy finishes, and the re-emergence of iconic design elements like tubogas and polished gold. The opulence of the Georgian and Victorian eras also resurfaces in intricate, luxury-driven pieces, blending antique influences with contemporary innovation. At the same time, a revolution in personalization promotes creativity and self-expression, with trends like the "ear party" and the impact of social media driving a new wave of unique, mix-and-match styles.

The minimalist elegance of the graphique theme celebrates sleek, essential lines and lightweight materials, transforming simplicity into timeless sophistication. Jewelry in 2025 promises to be rich in historic references and innovation, offering designs that connect both the past and the future. The exploration of these trends underscores a dynamic shift, where traditional craftsmanship meets bold, modern interpretations, creating pieces that are as unique as the individuals who wear them.

As sustainability continues to shape consumer preferences, expect a rise in the use of recycled and responsibly sourced materials, ensuring that elegance does not come at the expense of the planet. The trend towards gender-neutral designs also gains momentum, reflecting broader societal shifts towards inclusivity and diversity. Digital advancements further influence the design process, with technology enabling new levels of customization and virtual try-ons, making jewelry more accessible and personal than ever before.

#SELFEXPRESSION #GLOSSYMETALS
#XTREMEDECOR #SLEEKELEGANCE
#VINTAGEREVIVAL #CRAFTCORE

#EARPARTY #BOLDMINIMALISM
#NOGENDER #CLEANLINES
#OPULENTDESIGN #ECOMATERIALS

DESIGN DIRECTIONS 2025



01. BOLDNESS

- #VINTAGEAESTHETICS
- #CABOCHONS
- #GLOSSYMETALS
- #ROUNDEDSHAPES
- #RETROFEELING
- #SCULPTURALISM



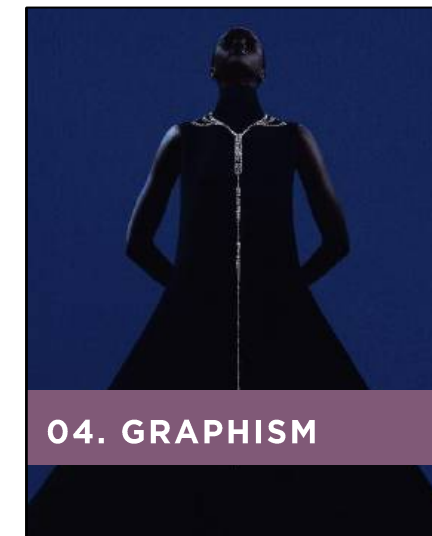
02. OPULENT DECOR

- #REGENCYSTYLE
- #DECORATIVISM
- #LACEWORK
- #FLORALENGRAVINGS
- #CARVINGS
- #FLORALDECOR



03. SUPERSTYLING

- #FOLLOWYOURMOOD
- #EARPARTY
- #MIXEDMEDIA
- #PLAYFULCHARMS
- #MULTILAYERING
- #SELFEXPRESSION



04. GRAPHISM

- #CLEANLINES
- #VORTEX
- #GEOCAGE
- #SINUOSITY
- #PATTERNPLAY
- #METALWORK



Haarper's Bazaar



Ana Khouri (@anakhouri)



Tiffany & Co. (@tiffanyandco)



Nevernot @never_not

BOLDNESS

The Revival of Vintage Aesthetics

Jewelry design in 2025 embraces boldness, inspired by the aesthetics of the 1970s and 1980s. Statement pieces exude confidence and individuality, with smooth, glossy metals like tubogas and polished gold defining this trend. Designers reinterpret vintage motifs through a contemporary lens, blending nostalgia with modern flair. These jewelry pieces stand as declarations of style, appealing to those who value expressive and versatile designs.

Cabochons and hardstones bring texture and vibrant color, amplifying the bold aesthetic. The interplay between opulent materials and refined lines underscores the importance of craftsmanship, where weight and feel enhance the luxury appeal. Rounded forms and high-polish finishes evoke timeless elegance, making these pieces enduring investments.

Advancements in technology, including 3D printing, enable intricate designs and innovative forms previously unattainable through traditional methods. This fusion of classic materials with cutting-edge techniques pushes the boundaries of bold, vintage-inspired jewelry. The result is a harmonious blend of nostalgia and innovation, perfectly suited to those seeking daring and personalized expressions of style.

KEY SILHOUETTES, AESTHETICS & MATERIALS: Chokers, torques, chunky hoops, bold bangles, retro-inspired rings, two-tone chains, metal spheres, and golden beans. Decreasing chains, gold-stone combinations, detachable earrings, Deco patterns, asymmetrical designs, stackable pieces, hybrid designs, mix-and-match styles, textured metals, mixed metals, enamel, tubogas, recycled gold, titanium, brass, aluminum, diamonds, pearls, black onyx, malachite, moonstone, lapis lazuli, coral, white agate, and semi-precious stones.

**#VINTAGEAESTHETICS #CABOCHONS
#GLOSSYMETALS #ROUNDEDSHAPES
#RETROFEELING #SCULPTURALISM**



JEWELRY | References



Teardrop Designs



Mateo @mateonewyork



Sauer @sauer



Emily P. Wheeler @emilypwheeler

Mini-Cabochons



GIORGIO B. @giorgiobofficial

Tubegas



Mazarin @mazarin_paris

Cult Revival



Tiffany & Co @tiffanyandco

Hard Gemstones



Seaman Schepps @seamanschepps

70s Graphics



David Webb @davidwebbjewels

Chunky Links

Fluid Lines



Mikimoto @official_mikimoto



Faberjés @officialfaberjés



Dolce & Gabbana



Marina B. @marinabjewelry

OPULENT DECOR

Blending Heritage and Innovation

This trend emphasizes opulent jewelry inspired by the grandeur of Georgian and Victorian eras, defined by elaborate techniques like engraving, lace cut-outs, and gemstone carving. These pieces go beyond decoration, telling timeless stories of elegance and refinement. Large gemstones, often set in intricate floral motifs, enhance their natural brilliance, creating works of art that blend traditional craftsmanship with modern aesthetics. Luxurious materials such as high-karat gold, platinum, emeralds, rubies, sapphires, and pearls lend sophistication to the designs. Hand-engraving, filigree, and other intricate techniques showcase exceptional artistry and attention to detail. These jewels are created to be cherished heirlooms, embodying enduring beauty and craftsmanship.

Sustainability also plays a key role, with recycled gold and ethically sourced gemstones reflecting the industry's shift towards eco-conscious practices. This fusion of luxury and responsibility appeals to modern, discerning consumers.

Technology complements tradition, with innovations like laser engraving enabling intricate patterns that elevate the designs. By merging old-world charm with contemporary precision, these pieces offer a balance of history and modernity. Each creation feels timeless yet fresh, appealing to those who appreciate jewelry as both art and legacy.

KEY SILHOUETTES, AESTHETICS & MATERIALS: Stunning necklaces, bangles, brooches, cocktail rings, huge earrings, limited edition pieces, antique jewelry, vibrant nature-inspired designs, wire-wrapped elements, decorative arts, carved gemstones, pearls, crystals; titanium, yellow and white gold, silver, recycled metal, and top-quality gems.

#REGENCYSTYLE #DECORATIVISM
#LACEWORK #FLORALENGRAVINGS
#CARVINGS #FLORALDECOR

JEWELRY | References



Mythological Wings



Messika @messika

Modern Maharaja



Boucheron @boucheron



Sorellina @sorellinajewelry

Secret Lockets



Staurino @staurinoofficial

Intricate Lace



Alessio Boschi @alessio_boschi_jewels

Golden Pearls



Storrow @storrowjewelry

Heirlooms & Charms

Mismatched Earcuffs



Piaget @piaget

Gems & Cameos



Seaman Schepps @seamanschepps



SUPERSTYLING

Self-Expression Revolution

The jewelry industry is embracing personalization and self-expression, driven by a desire for individuality. Jewelry now serves as a medium for telling personal stories and showcasing unique identities. This trend is exemplified by "ear parties," where multiple earrings are styled together to create evolving, customized looks. Each piece becomes part of a cohesive narrative, reflecting the wearer's journey. Innovative materials like enamel and resin bring vibrant colors and textures to designs, often paired with traditional metals for playful sophistication. Lab-grown diamonds and gemstones are also gaining prominence, offering brilliance and beauty at accessible price points with perceived environmental benefits, making them a popular choice for personalized pieces.

Social media amplifies this trend, inspiring experimentation and encouraging a mix-and-match approach that defies traditional jewelry rules. The result is an eclectic, ever-changing aesthetic reflecting diverse consumer tastes.

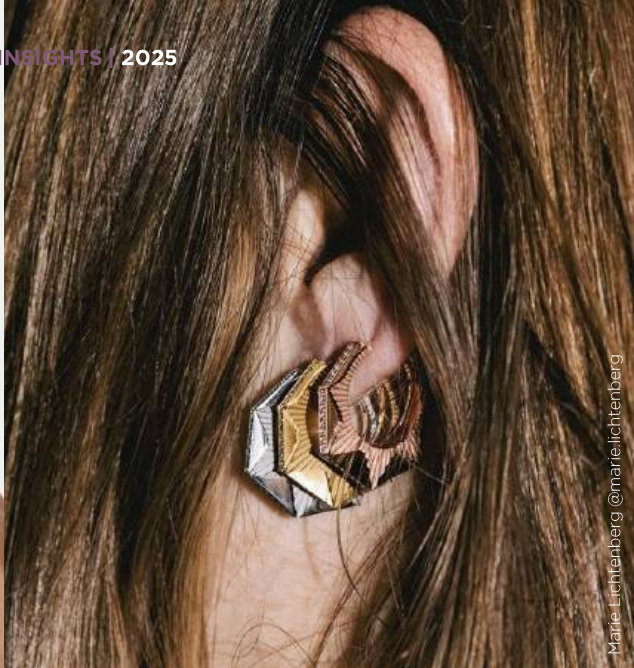
This movement goes beyond adornment; it's about making statements and fostering connections through creativity. With versatile designs, these pieces suit everyday wear while remaining special and meaningful, allowing wearers to craft bold or subtle looks that are uniquely theirs.

KEY SILHOUETTES, AESTHETICS & MATERIALS: Multi-layered Necklaces, Dangle Earrings, Multiple Earrings, Double Rings, Transformable Pieces, Styled Watches, Ear Cuffs, Fittable Bracelets, Ear Climbers, Mix & Match, Stackable, Personalization, Charms & Pendants, Locks And Closures. White And Yellow Gold, Enamel, Diamonds, Pearls, Coloured Titanium, Mixed Media, Stingray Leather, Wood, Shells; Recycled And Re-used Objects.

#FOLLOWYOURMOOD #EARPARTY
#MIXEDMEDIA #PLAYFULCHARMS
#MULTILAYERING #SELFEXPRESSION



Pandora @theofficialpandora



Marie Lichtenberg @marie.lichtenberg



Marie Aaron @marlaaron



Chaumet @chaumetofficial



JEWELRY | References



Interchangeable Earrings



Yana Nesper @yanansper



RAINBOWK @rainbowjewelry

Dark Metals



Armiss @armissjewels

Multi-Layered Enamel

XL Links + Clasp Pearl



Tiffany & Co. @tiffanyandco

Locks & Chains



Lulu Frost @lulufrost



Prakshi @prakshi_finejewelry

Bejeweled Spikes



Suzanne Kalan @suzannekalan

No Gender

Graffiti Art



Susana Martins @imsusanamartins



Boucheron@boucheron



INBILICO @inbilio.co



Louis Vuitton @louisvuitton



Yuesphere Jewellery @yuesphere

GRAPHISM

The Evolution of Sleek and Geo Designs

A strong focus on minimalist, contemporary design defines this trend, emphasizing clean lines, essential shapes, and lightweight materials. The beauty lies in its understated elegance and refined craftsmanship, with distinctive marks like swirls and V-shapes adding visual intrigue.

These designs prioritize form and structure, balancing aesthetics with functionality. Lightweight materials enhance comfort and versatility, making the pieces ideal for both everyday wear and special occasions. Their simplicity ensures seamless pairing with diverse outfits, establishing them as essentials in any jewelry collection.

This minimalist movement reflects a shift towards sustainability and conscious consumption. Timeless designs encourage investment in enduring, stylish pieces over fleeting trends. The result is jewelry that feels both modern and timeless, appealing to those who value fine details and subtle sophistication.

The minimalist aesthetic allows wearers to express their style subtly while showcasing the designer's skill in crafting unique, memorable creations within the constraints of simplicity. As more people seek contemporary designs with timeless appeal, this trend is poised to grow in popularity, offering jewelry that embodies modern elegance and enduring charm.

KEY SILHOUETTES, AESTHETICS & MATERIALS: Chokers and torques, hoop earrings, long finger rings, wire bracelets, slice necklaces, large cuffs, fluid jewels, graphism, scribbles, metalwork, pixels, vortex shapes, white and yellow gold, rose gold, black titanium, onyx, and diamonds, clean lines, modern minimalism, tech materials, lab-grown diamonds, ceramic, enamel.

**#CLEANLINES #VORTEX #GEOCAGE
#SINUOSITY #PATTERNPLAY
#METALWORK**

JEWELRY | References



Susana Martins @imsusanamartins

Mismatched Earrings



Hearts On Fire @heartsonfire

Minimalism



Sarah Ho @sarahhojewellery

Cubism



Cedille Paris @cedille_paris

Circle Single Earring



Lavinia Fuksas @lfuksas

Mismatched Earrings



Nigaam @nigaam_jewels

V-Shape Rings

Lariat Necklaces



RF Jewels @rfjewels

Vortex Design



Mateo @mateonewyork

BRIDAL KEY DESIGN & TRENDS

Focus on Storytelling and Individuality

With the timeless nature of bridal jewelry and the long-term expectations associated with it, classic silhouettes and simple styling will continue to dominate the bridal category. When consumers purchase bridal jewelry, they seek designs that transcend fleeting trends and stand the test of time. However, within this desire for enduring style, there are key elements and personal preferences that can influence the final purchase decision.

1. Personalization & Storytelling: Couples are gravitating toward unique silhouettes and symbolic designs: Toi & Moi rings, kite and hexagon-shaped stones, east-west settings. Multi-stone and architectural designs that reflect individuality and shared values.

2. Minimalist & Gender-Inclusive: Clean lines with emerald or princess cuts. Gender-neutral rings and mixed-metal sets signal inclusivity and versatility.

3. Color as a Statement: Gemstones like sapphires, emeralds, rubies, and pearls, are rising in popularity for their color, character, and symbolism.

4. Vintage Revival: Modern interpretations of three-stone rings, chunky gold bands, and bezel settings offer timeless appeal with a current edge.

5. Transformable & Functional Accessories: Convertible pieces like stackable eternity rings, crossover pendants, and mini hoops add post-wedding wearability and flexibility.

6. Material & Sustainability Drivers: Recycled metals and alternative materials are now mainstream options for consumers who prioritize sustainability. While there is debate on the subject, lab-grown diamonds can fall into this category based on consumer perception. Ethical sourcing, transparency, and environmental impact are not just “nice-to-haves”, they’re expected.

7. Expanding the Bridal Jewelry Category: Modern bridal looks go beyond rings to include: Diamond tiaras, cuffs, layered necklaces, lapel pins, and bold earrings. Versatile pieces that transition seamlessly from ceremony to everyday life.

KEY SILHOUETTES, AESTHETICS & MATERIALS: Toi & Moi rings with mismatched stones, east-west settings, three-stone rings, chunky bands, bezel settings, asymmetric designs, vintage revival, gender-neutral rings, bridal sets (three rings, mixed metals), transformable rings, eternity rings stacked, mini diamond hoops, crossover pendants with central diamond accent, cufflinks, lapel pins, yellow and white gold, platinum, recycled metals, ethical sourcing, engravings, mixed metals, customization, sustainability-focused design.



Hardy Brothers Jewellers @hardybrothers



OHILIGUER @ohilguer



The Ravy @theravy



Hearts on Fire @heartsonfire

BRIDAL | References



Boucheron@boucheron

Gender Neutral



Chaumet@chaumetofficial

Sleek Diamond Tiara



Richard Wu @richard_wu_jewelry



acredo GmbH @acredo_official

Mixed Metals Bridal Set

Crossover Necklaces



Hearts On Fire @heartsonfire



Eva Fehren@evafehren

Pavé Platinum Bangle with Central Diamond



James Allen @jamesallenring

Toi & Moi



Suzanne Kalan @suzannekala



Messika @messikajewelry

Titanium Male Band

Lab-Grown Emerald Cut Bezel Cufflinks



VRAI @vraiofficial



Jared @jared.com

Ethically Sourced



Valentina Callegher @valentinacallegher

Eternity Stacks



Grown Brilliance @grownbrilliance

Three-Stones Ring

Half Eternity Ring



Anita Ko @anitakojewelry



<https://plumbclub.com>



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<https://www.facebook.com/plumbclub/>



<https://www.linkedin.com/company/the-plumb-club-association-inc./>