

EU MARKET SURVEY 2002

PRECIOUS AND SEMI-PRECIOUS STONES

VOLUME II



CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

PRECIOUS AND SEMI-PRECIOUS STONES

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New CBI Publication with new format and contents, partly replacing CBI market survey Precious and semi-precious stones, June 1998.

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REPORT SUMMARY

This EU market survey profiles the EU market for precious and semi-precious stones. The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major national markets within the EU for precious and semi-precious stones are Belgium, United Kingdom, France and Italy. These countries and The Netherlands will be highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on imports and exports and information on trade structure, prices and margins is provided.

As an exporter, you need this information in order to formulate your own market and product strategies. To assist you with this, CBI has developed a matching EU Strategic Marketing Guide 'Precious and semi-precious stones'. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting precious and semi-precious stones to the European Union. It aims to facilitate exporters in formulating their own markets and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on production and trade, and information on trade structure, prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research

This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read the survey and then filled in the frameworks in the strategic marketing guide, it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself). An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are, among others, (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you have received/collected your information, you should analyse it.

In order to judge the attractiveness of the market, sales channel or customer, you should use/develop a classification or score system.

For more detailed information on market research, reference is made to CBI's Export Planner (2000).

Consumption

The market for precious and semi-precious stones in the EU can be clearly divided into diamonds and all other products. The diamond market is fifty times bigger than all the other stones together. Due to the favourable economic conditions in the EU during 1998-2000, the market showed a healthy growth. Consumption of precious and semi-precious stones is very diverse. They are not only bought as jewellery, but increasingly as a fashion item. Further, stones are bought as a collector's item by individuals and museums and because of their supposed therapeutic qualities. The consumption of precious and semi-precious stones as a decoration item in houses and offices is increasing. Sales of precious and semi-precious stones are closely related to economic conditions and consumer confidence.

There are no consumption figures available. Trade associations in this sector concern themselves mainly with collective promotion, legislation, security matters, import taxes, etc. but not with consumer trends and consumption.

Trends

An important stimulation of demand for precious and semi-precious stones is caused by the New Age fashion. Therapists and medical doctors seek many stones due to their supposed therapeutic properties. Consumers are increasingly interested in the so-called metaphysical aspects of stones. This trend leads to demand for special cutting forms as:

- Pyramids
- Spheres
- Pendulums
- Massage crystals
- 'Touch stones' (various rounded shapes that are pleasant to touch and small enough to carry in one's pocket)

Several of these items are not new but take on a new life in this new application. For example tumbled stones, loose or mounted, have always been used for decorative purposes. However, less decorative stones with metaphysical purposes are now also in demand.

The trend is clearly towards higher quality precious and semi-precious stones, as consumers become increasingly critical towards quality aspects.

Further the so-called 'power bead' wrist laces have grown tremendously in popularity. These products are increasing the market for semi-precious stones and might even surpass the existing market. Minerals bought for collection are becoming smaller and of higher quality. As space to display minerals is limited, collectors tend to buy smaller, but more expensive stones.

Another trend favours pure, untreated stones, so the real character of the stone is saved. For example, citrine must be natural citrine and not the heat-treated amethyst that is mostly sold as citrine.

Fashion trends also have a big influence on precious and semi-precious stones. For example, a trend in jewellery fashion can be detected towards using more coloured stones. The same applies to cultured pearls, especially fresh-water pearls. This market grew explosively because of fashion influence. Presently the market seems to be saturated with supplies big enough to satisfy demands.

Consumption of precious and semi-precious stones depends very much on prevailing economic conditions. Due to the economic downturn in the EU that started in 2001, it is expected that consumption of rather expensive precious and semi-precious stones will at best stabilise, but will decline compared to the period 1998 – 2000.

Production

Diamonds constitute 96 percent of the total market. No diamonds are mined in the EU. Rough stones are imported from non-EU countries and cut, polished and shaped in the diamond industries in Antwerp and London. 50 percent of the total world trade in rough diamonds goes through Antwerp: the most important diamond-trading centre in the world.

Germany and Italy are the leading countries for the design of precious and semi-precious stones, other than diamonds.

The diamond sector is very closed and no production figures are available. Moreover, smuggling of diamonds from production fields into the EU takes place, adding to the lack of clarity of the sector.

Imports

Total imports of precious and semi-precious stones showed a constant increase in value during the period 1998 – 2000: from US\$ 15 (€ 13.4) billion in 1998 to US\$ 21 (€ 22.8) billion in 2000. Imports of worked and unworked diamonds accounted for US\$ 20,280 (€ 22,043) million in 2000 or 96 percent of total imports of precious and semi-precious stones.

The imports excluding unworked and worked diamonds amounted to US\$ 738 (€ 802) million in 2000, a decrease of 1 percent compared to 1999.

Belgium was the leading importer in 2000 with an import value of US\$ 12 (€ 13) billion, accounting for 59 percent of total imports, followed by United Kingdom with US\$ 6.8 (€ 7.4) billion (33%).

Together they account for 92 percent of total EU imports. This is due to the fact the Antwerp and London are important diamond-trading centres. Imports from developing countries increased substantially in 2000: from US\$ 5.129 (€ 4.839) billion in 1999 to US\$ 6.526 (€ 7.09) in 2000, an increase of 27 percent. The increase was especially substantial for the following products:

- Diamonds unworked: 37 percent
- Articles of natural or cultured pearls: 30 percent

Switzerland was the leading supplier to the EU, accounting for 17 percent of the import value, followed by United Kingdom (15%), South Africa (9%) and Israel (8%).

However, Switzerland is not a producing country. Apparently, due to its special position in international financial transactions, many exporters to the EU have their office in this country.

Developing countries were the largest suppliers of precious and semi-precious stones, unworked (72% of total imports in value into the EU), articles made wholly of precious and semi-precious stones (60% of total value imports into the EU) and precious and semi-precious stones, worked (49% of total value imports into the EU) in 2000.

In terms of the main product groups, imports into the EU showed the following developments:

- Diamonds, unworked: a substantial increase of 51 percent in value during 1998 – 2000
- Diamonds, worked: an increase of 22 percent in value during 1998 – 2000
- Rubies, sapphires and emeralds, worked: an increase of 4 percent in value during 1998 – 2000
- Cultured pearls, worked: a decline of 10 percent in value during 1998 – 2000
- Cultured pearls, unworked: a stable market during the period under review
- Precious and semi-precious stones, unworked: a decline of 10 percent in value during 1998 – 2000
- Precious and semi-precious stones, worked: an increase of 8 percent in value during the period under review

Exports

Belgium and United Kingdom are the largest exporters of diamonds in the EU. Unworked diamonds are imported, cut, polished and shaped in the diamond centres of Antwerp and London and exported as worked diamonds, mainly to EU destinations.

Germany is the largest exporting country for the other products. 70 percent of exports is intra-EU oriented and amounted to US\$ 19,000 (€ 20,650) million in 2000. Major destinations outside the EU in 2000 were India (US\$3,860/€ 4,196 million), Israel (US\$ 3,515/€ 3,821 million) and the USA (US\$ 3,080/€ 3,348 million).

Trade structure

A clear distinction should be made between trade channels for diamonds and those for all other precious and semi-precious stones.

De Beers Consolidated Mines in South Africa dominates the trade in diamonds. It is estimated that their Central Selling Organization (CSO) controls 60 percent of the total global trade in rough diamonds. CSO sells rough diamonds to strictly selected buyers, the so-called 'sight holders'.

Diamonds are sold through the following retail outlets:

- jewellers
- department stores
- gold and silversmiths
- diamond traders/cutters who sell retail as a side activity

A few specialised wholesalers and larger retailers import the other precious and semi-precious stones into the EU. These products are sold through the following outlets:

- rock shops
- jewellers
- gold and silversmiths
- gift shops
- New Age stores
- mineral fairs
- department stores
- flower and garden decorator shops.

Opportunities for exporters in developing countries

Wages in EU countries are very high and form a substantial part of the total product costs. In order to be more competitive, producers in EU countries look increasingly to developing countries for the production of worked precious and semi precious stones.

There are good opportunities for exporters in developing countries who can provide quality products and who are willing to listen to market demands in EU countries to supply EU countries. Importers look for producers instead of middlemen, so it is important for exporters to show that they have mining and production facilities.

CBI services

The EU Strategic Marketing Guide "Precious and semi-precious stones" provides exporters in developing countries with practical information for entering the EU market.

The guide describes requirements for access to the EU, terms of trade, trade promotion and marketing guidelines. For information on CBI programmes, training and seminars and for downloading market information and CBI News Bulletins, please go to the Internet site www.cbi.nl

1 PRODUCT CHARACTERISTICS

About 3,900 different species of minerals are known today. This huge variety of minerals is usually divided into two main product groups: precious stones (or gemstones) and semi-precious stones.

The market for precious and semi-precious stones should be divided into two parts:

- diamonds
- all other precious and semi-precious stones

The trade in diamonds in the EU is about fifty times bigger than in all the other stones together.

Diamonds for industrial use and synthetic stones are not included in this survey.

1.1 Product groups

1.1.1 Precious stones

Precious stones can be defined as the most wanted and highly valued stones for jewellery purposes. Physical properties such as colour, lustre, clarity and hardness determine whether a stone is suitable for jewellery purposes or not. Good colour, lustre and clarity make a stone optically attractive. Hardness gives the stone the durability that is required for use in jewellery.

Rough stones

Rough stones are generally all the unworked precious stones. This group consists of stones for decoration and collecting purposes. The latter group is normally referred to as 'minerals'.

The stones are wanted for decoration mainly because of their beauty of colour, shape or crystals.

The minerals are interesting for collection purposes because of properties mentioned or because of their rarity, origin, chemical properties and other subjects of interest to collectors.

Important properties are type of matrix (host rock or mother rock), specific trace elements and inclusions. Combinations of these three properties, together with size and weight of the piece, determine the price.

Cut stones

Cut stones are generally all cut-and-polished stones. They have been subjected to an operation of polishing, carving, cutting and drilling. Cut stones can be divided into two main groups:

- worked stones mainly for jewellery purposes.
- worked stones other than for jewellery purposes. These can be carvings, decorative objects like slabs, spheres and eggs or all kind of utensils like ashtrays, bowls, paperweights, spoons, table tops, pendulums, massage crystals, etc.

Cut stones can also be subdivided according to cutting forms:

- *faceted forms*. Mainly used for transparent stones, because of their optical properties like colour and light play. The main members of this group are: Diamond, Sapphire, Ruby, Emerald, Aquamarine, Topaz, Tourmaline, Opal, Zircon, Garnet, Spinel, Chrysoberyl and Tanzanite.
- *cabochons, beads and other rounded forms*. Mainly used for translucent and opaque stones, because these forms show their optical properties, like colour, lustre and clarity, at best. The main members of this group are: Jade, Turquoise, Lapis Lazuli, Labradorite, Amber, Coral and Pearl.

Amber, Coral and Pearl are organic materials, so they cannot be called 'precious stones'. However, because of their importance on this market, they are added to this group.

Sometimes precious stones like diamond, ruby, emerald, etc. are sold in rough form for collectors. In this case they are listed as 'minerals' rather than 'precious stones'.

1.1.2 Semi-precious stones

Semi-precious stone is the general name for all the crystallised minerals not being precious stones.

The division between rough and cut stones, as described above, is also applicable in this group.

It consists of a wide variety of different types which are divided into various subdivisions.

Due to the number of varieties and subdivisions it is not possible to give a complete summary.

The most important and well-known types are:

Amethyst, Agate, Rock Crystal, Rose quartz, Pyrite, Calcite, Malachite, Hematite, Fluorite, Selenite, Rhodochrosite, Obsidian, Azurite, Chrysocolla, Zeolite, Celestite, Tiger's eye and Moonstone.

Natural and synthetic stones

The difference between natural and synthetic will always be an important question for dealers working with precious and semi-precious stones.

Apart from natural stones, the market also consists of (wholly or partly) unnatural stones. Because of improved techniques to make such stones, an increasing number appears on the market. As the quality of these stones is improving, it makes it more difficult to distinguish them from natural stones.

Five groups are distinguished:

1. Synthetically grown (man-made) stones
2. Imitations: natural or synthetic stones that resemble a natural stone and can be used to imitate this stone.
For example cubic zirconia is a diamond imitation
3. Composites like doublets or triplets are combinations of natural/natural or natural/synthetic stones
4. Reconstructed stones are artificially manufactured stones of natural 'ingredients'
5. Treated natural stones: heat treated, irradiated, dyed, stabilised (with artificial resin) or treated with various chemicals in order to improve and/or change the colour and/or the clarity

The above-mentioned list will get longer as these techniques become more sophisticated. Therefore it is very important for dealers to have accurate information about the origin and treatment of the stone.

Suppliers are advised to be open and honest about this subject, in order to maintain a good and durable relationship with their trade partners in the EU.

Synthetic and imitation stones must be referred to as such; otherwise it is plain fraud!

Many stones belonging to group 3,4 and 5 are more or less accepted on the market. However it should be mentioned when selling the stones.

For example: Turquoise, Lapis Lazuli, blue topaz, opal composites and citrine.

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used worldwide. This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO).

The system comprises about 5,000 commodity groups. Each is identified by a six-digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification.

More than 177 countries and economies use the system as a basis for their Customs tariffs and for the collection of international trade statistics.

WCO is currently introducing alterations to the HS and these were scheduled to be included in the combined nomenclature as of January 1, 2002. After the six-digit code, countries are free to use further subheadings. An 8-digit system is used in the trade data of Eurostat. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are sometimes used.

The use of the right product classification can prevent many problems. The so-called fancy names and local names are so numerous that they easily lead to confusion. Names like smoky topaz, golden topaz and ruby garnet suggest other stones than those meant.

To avoid confusion, especially in case of the rarer stones, it is best to use the simplest definition:

Colour + family name. For example bixbite = red beryl, starlite = blue zircon.

Although both names are correct, the second ones are clearer.

Table 1.1 gives the four-digit list of the main HS codes for precious and semi-precious stones.

A detailed list of HS codes and corresponding product names and descriptions can be found in Appendix 1 of this survey.

Table 1.1 HS code classification of precious and semi-precious stones	
HS codes	Products
71.01	Natural or cultured pearls
71.02	Diamonds
71.03	Other natural precious and semi-precious stones
71.04	Synthetic or reconstructed precious and semi-precious stones
71.05	Powder and dust from natural or synthetic precious and semi-precious stones

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and cooperation agreements with the EU. It is envisaged that 10 of these countries will become members in 2004.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2002 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4 percent in 2001 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US\$ 7,856.6 (€ 8,539.8) billion at current prices, while the average GDP per capita (at current exchange rates) amounted to US\$ 20,759 (€ 22,564) in 2000 (OECD, 2002).

The most important aspect of the process of unification (of the former EC countries), which affects trade, is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

Since 1st January 2002, the Euro (€) is used as legal currency within twelve EU member states: Austria, Belgium, Finland, France, Germany, Greece, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998 and 1999, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate. The Euro (€) / US\$ exchange rate currently (November 2002) stands at around US\$ 0.99 for one Euro.

The US\$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the Euro (€) values and transferred into US\$ with the exchange rates indicated below

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat can no longer depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about Euro (€) 100,000.

Country	Currency	1997	1998	1999	2000	2001	November 2002
European Union	ECU	1.13	1.12	–	–	–	–
	€	-	-	1.06	0.92	0.89	0.99
Denmark	Dkr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	Skr	0.13	0.13	0.12	0.11	0.10	0.11
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.44	1.58

Source: CBS Statline (November 2002)

As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

Due to the nature of the products (size and value), precious and semi-precious stones are often imported into the EU outside the regular channels. This gives an extra reason why official trade figures must be interpreted with extreme caution.

This survey focuses on the five major EU markets for precious and semi-precious stones. They are, Belgium, United Kingdom, France, Italy and The Netherlands. These EU member countries will be highlighted, because of their relative importance in terms of consumption, production, imports and exports.

3 CONSUMPTION

There is very little information available regarding consumption of precious and semi-precious stones. Exporters in developing countries are therefore advised to contact trade associations and importers in the EU in order to obtain additional information. Contact details can be found in appendices 5 and 11 of this survey.

3.1 Market developments

The EU market for precious and semi-precious stones is the second largest in the world, after the USA.

It is roughly estimated that the diamond market in the EU is worth US\$ 40 (€ 43.5) billion.

More than 50 percent of the world's consumption of diamonds is traded in Antwerp, making this city the largest diamond-trading centre in the world.

Unfortunately there are no consumption figures available, as the sector does not record sales to consumers.

The market developments for the different product groups can be described as follows:

Diamonds

The market for diamonds showed an impressive growth in the EU during the last few years. Due to the strong economic performance and the increase in spending power, sales of diamonds to consumers increased. Diamond sales are closely related to economic conditions in the EU. When consumer spending power decreases, this has an immediate effect on the sales of diamonds. For example, it was reported that in Germany jewellery sales declined by 16 percent in 2001, due to unfavourable economic conditions.

Cut precious and semi-precious stones

These stones are becoming more and more known to consumers and are increasingly bought by them. First-time consumers usually buy smaller stones, as these fall into a lower price category. Due to increasing affluence, consumers demand higher quality. As the number of suppliers increases, buyers have a wider choice and can demand stricter requirements to the price/quality ratio.

Articles made of precious and semi-precious stones

The so-called 'power bead' bracelets were an enormous hit. However, this trend has flattened out a bit. Chances are that this trend opened a much bigger market than that existing for semi-precious stones in general.

Minerals, precious and semi-precious, for collection purposes

An increasing demand for quality is apparent in this segment. Many collectors are private persons.

Due to the fact that available space in their houses is limited, collectors tend to buy smaller but more expensive minerals.

Semi-precious stones for decorative purposes

This segment increased substantially during the past few years. The trend is towards lower consumer prices in order to cater for impulse purchases by consumers who do not judge the stones on quality, but on appearance.

3.2 Market segmentation

The market for precious and semi-precious stones can be segmented into:

Diamonds

Rough and worked, constituting by far the largest segment of the market with an estimated share of more than 90 percent.

Cut precious and semi-precious stones

Mainly ruby, sapphire and emerald

Articles made of precious and semi-precious stones

Necklaces, bracelets, pendants and 'New Age' articles

Minerals, precious and semi-precious, for collection purposes

Mainly unworked

Semi-precious stones for decorative purposes

Slabs, spheres, pyramids, bookends, etc.

3.3 Market trends

An important stimulation of demand for precious and semi-precious stones is caused by the New Age fashion. Many stones are sought by therapists and medical doctors, due to the stones' supposed therapeutic properties. Consumers are increasingly interested in the so-called metaphysical aspects of stones. This trend leads to demand for special cutting forms such as:

- Pyramids
- Spheres
- Pendulums
- Massage crystals
- 'Touch stones' (various rounded shapes that are pleasant to touch and small enough to carry in one's pocket)

Several of these items are not new but revive in this new application. For example tumbled stones, loose or mounted, have always been used for decorative purposes. However, less decorative stones with metaphysical purposes are now also in demand.

Consumer preferences vary from market to market and are dependent on purchasing power, taste and culture. Products like rock, labradorite, moonstone, aquamarine and emerald, together with new products like 'moqui marbles' and 'boji stones', have seen increased sales in recent years.

The trend is clearly to pure, untreated stones, so the real character of the stone is preserved. For example, citrine must be natural citrine and not the heat-treated amethyst that is mostly sold as citrine.

Fashion trends also have a big influence on precious and semi-precious stones. For example, a trend in jewellery fashion can be detected towards using more coloured stones.

The same applies to cultured pearls, especially fresh-water pearls. This market grew explosively because of fashion influence. Presently the market seems to be saturated with supplies big enough to satisfy demands.

In general it can be stated that there is an increasing demand for higher quality products. Consumers are becoming more familiar with precious and semi-precious stones. Poor quality hardly sells anymore. At the same time, good quality stones can be produced much more cheaply than some years ago.

Another trend which can be seen in the market concerns semi-precious stones. This market was traditionally dominated by a relatively small number of 'stone-minded' buyers. However, a new group of consumers has entered the market. They buy semi-precious stones mainly because of decorative properties. These stones are bought as gifts, for interior decoration, as ornaments for gardens and for metaphysical purposes.

4 PRODUCTION

4.1 Diamonds

No diamonds are mined in EU countries.

Rough diamonds are imported from non-EU countries and cut, polished and shaped in the diamond centres of Antwerp and London. These worked diamonds are exported and sold to retail outlets in the EU.

There are no production figures available, as the diamond industry is very closed and does not assemble production figures from the diamond cutting industry.

The largest deposits of diamonds are found in Africa, whereas the largest cutting industries are located in South East Asia. Australia and Congo are the largest supplying countries for industrial diamonds. Botswana, Russia (Siberian province of Yakutia), South Africa, Namibia, Canada (Northwest Territories) and Congo are the main suppliers for gem quality stones.

'De Beers Consolidated Mines' in South Africa heavily influences the supply of diamonds. This company has kept a firm control over the supply and prices of diamonds for more than a century. De Beers owns mines in, mostly, South Africa and purchases production of other mines worldwide. It is estimated that they control about sixty percent of the rough diamond trade.

The mines in the Siberian province of Yakutia produce about 22 million carats per annum. They pose a big challenge to the monopoly of De Beers.

De Beers' Central Selling organization (CSO) is the marketing channel which moves the rough diamonds to strictly selected buyers, called 'sight holders', at fixed prices. These wholesalers buy mixed lots, which they sort, evaluate and trade or process.

It is estimated that the worldwide production of rough diamonds is 90 million carats. There are no production figures available, due to the large scale smuggling of diamonds and the secrecy surrounding the products.

The relationship between De Beers and Russia is an uneasy one. Due to its large output of rough diamonds, Russia can have a strong impact on the price forming of diamonds. The recent cooperation agreement between Russia and Namibia strengthens the belief that the De Beers diamond cartel is losing power.

4.2 Other precious and semi-precious stones

As is the case with diamonds, there are no production figures for other precious and semi-precious stones.

Stones can be imported unworked and sold as such to collectors and consumers. Many stones are imported already in worked condition from supplying countries, for example bracelets and necklaces. Besides, stones are imported and cut in EU countries in special forms like pyramids, spheres, pendulums, massage crystals and 'touch stones'.

Germany and Italy are leading EU countries in the production of precious and semi-precious stones, other than diamonds.

Many independent mining companies produce in developing countries and sell their range to importers in the EU.

5 IMPORTS

As already mentioned in chapter 2 of this survey, the import figures are based on Eurostat data. These figures show the official imports into the EU as declared to Customs of the importing countries. However, an unofficial market exists for smuggled precious and semi-precious stones. For example, diamonds are of small volume and high value, which makes them easy to smuggle.

Further, De Beers is selling rough diamonds in lots. A lot contains different grades, which are sorted by the buyer. For example, a lot can be meant for industrial purpose but can also contain high-grade diamonds for cutting and retailing. In this case, the whole lot is imported as industrial diamonds under a different HS code.

A major part of the supply from the former Soviet countries is not officially exported and imported. Therefore, they cannot be traced in the official Customs' statistics.

Other sources can give different figures. Therefore, the statistics should be read with caution. They should not be interpreted as absolute data, but more as trends in the different markets.

Own research remains therefore an integral part in studying the EU market for precious and semi-precious stones.

Chapter 71 of the Harmonised System covers precious and semi-precious stones discussed in this survey. The chapters Imports and Exports will cover the following product groups:

- 7101.1000: natural pearls
- 7101.2100: cultured pearls, unworked
- 7101.2200: cultured pearls, worked
- 7102.3100: diamonds, unworked
- 7102.3900: diamonds, worked
- 7103.1000: precious and semi-precious stones, unworked
- 7103.9100: rubies, sapphires and emeralds, worked
- 7103.9900: precious and semi-precious stones, worked
- 7116.1000: articles of natural or cultured pearls
- 7116.2011: necklaces, bracelets and other articles, wholly of natural precious or semi-precious stones
- 7116.2019: articles made wholly of precious and semi-precious stones, other than 7116.2011
- 7116.2090: articles made of precious and semi-precious stones, natural, synthetic or reconstructed other than 7116.2011 and 7116.2019

Table 5.1 Imports of precious and semi-precious stones into the EU, 1998-2000
US\$ 1,000/ € 1,000/ tons

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	15,322,153	5,121	19,043,144	17,965,230	5,294	21,018,863	22,846,590	6,389
Extra-EU	11,437,254	4,792	14,306,180	13,496,396	4,995	16,285,900	17,702,065	6,070
Developing countries	3,868,499	4,128	5,129,308	4,838,970	4,423	6,526,678	7,094,215	5,312
Belgium & Luxembourg.	9,523,972	85	11,026,483	10,402,342	71	12,426,109	13,506,641	70
United Kingdom	4,232,835	459	6,483,240	6,116,264	471	6,864,297	7,461,192	438
France	381,165	327	343,167	323,742	300	535,100	581,630	228
Italy	441,256	632	478,701	451,605	606	485,232	527,426	623
Germany	495,351	2,753	454,563	428,833	2,998	446,923	485,786	3,907
Spain	75,980	354	77,868	73,460	369	87,019	94,586	554
Portugal	56,514	38	55,398	52,262	40	49,861	54,197	36
The Netherlands	31,465	101	39,356	37,128	148	45,842	49,828	130
Austria	39,676	161	37,447	35,327	165	37,078	40,302	124
Ireland	7,731	44	12,526	11,817	8	11,479	12,477	5
Denmark	12,566	25	13,848	13,064	52	9,803	10,655	16
Sweden	9,968	65	9,480	8,943	11	9,433	10,253	7
Greece	7,749	73	5,614	5,296	49	5,770	6,272	243
Finland	5,930	4	5,470	5,160	6	4,921	5,349	8

Source : Eurostat 2000

Table 5.2 Imports of worked and unworked diamonds into the EU, 1998-2000
US\$ 1,000/ € 1,000/ tons

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	14,579,124	52	18,300,447	17,264,572	74	20,280,846	22,044,398	219
Extra-EU	10,791,765	27	13,661,053	12,887,786	38	15,642,263	17,002,460	32
Developing countries	3,649,431	4	4,901,149	4,623,725	10	6,288,323	6,835,133	9
<i>Leading importing countries in the EU</i>								
Belgium & Luxembourg.	9,469,904	21	10,954,306	10,334,251	26	12,373,778	13,499,759	22
United Kingdom	4,094,371	14	6,367,296	6,006,883	35	6,753,544	7,340,808	16

Source: Eurostat 2000

5.1 Total imports

Total imports of precious and semi-precious stones showed a constant increase in value during the period 1998 – 2000: from US\$ 15 (€ 13.4) billion in 1998 to US\$ 21 (€ 22.8) billion in 2000. Belgium was the leading importer in 2000 with an import value of US\$ 12 (€ 13) billion, accounting for 59 percent of total imports, followed by United Kingdom with US\$ 6.8 (€ 7.4) billion (33%). Together they account for 92 percent of total EU imports.

Imports from developing countries increased substantially in 2000: from US\$ 5.129 (€ 4.839) billion in 1999 to US\$ 6.526 (€ 7.093) in 2000, an increase of 27 percent.

Switzerland was the leading supplier to the EU, accounting for 17 percent of the import value, followed by United Kingdom (15%), South Africa (9%) and Israel (8%).

However, Switzerland is not a producing country. Apparently, due to its special position in international financial transactions many exporters to the EU have their office in this country.

Imports of unworked and worked diamonds dominate the total imports of precious and semi-precious stones. This group accounted for US\$ 20.281 (€ 22.045) billion in 2000, representing an import share of 96 percent. Due to favourable economic conditions in the EU during the period under review, the imports showed a growth of 37 percent in value in 2000 compared to 1998. Imports from developing countries increased by 69 percent in value in 2000 compared to 1998.

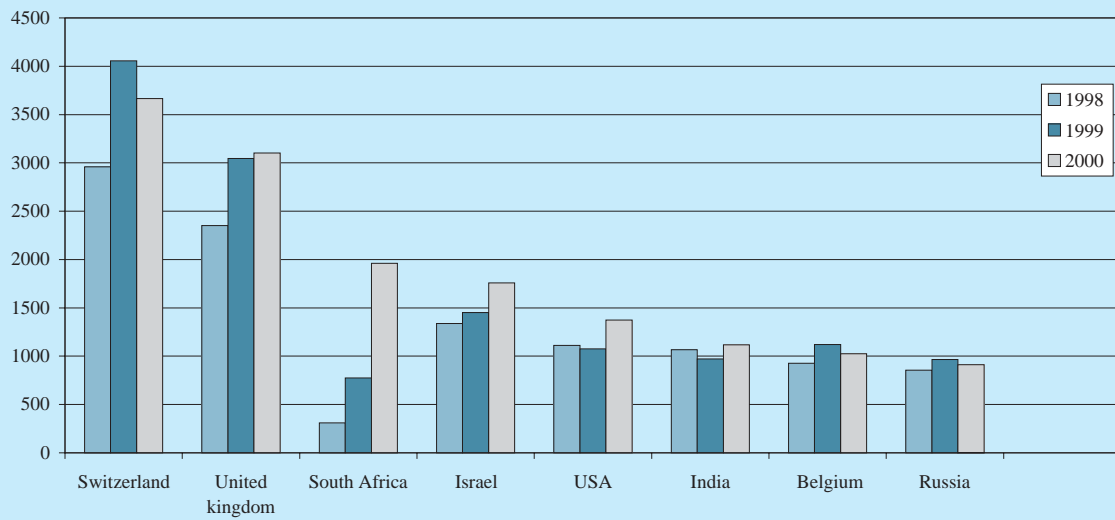
Belgium and United Kingdom accounted for 94 percent of total diamond imports in value in 2000. Sales of diamonds are always recorded in carats. One carat equals 0.2 grammes. Imports showed an impressive growth of 39 percent in value in 2000 compared to 1998.

Table 5.3 Imports of precious and semi-precious stones, excluding unworked and worked diamonds into the EU, 1998-2000, US\$ 1,000/ € 1,000/ tons

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	743,029	5,069	742,697	700,658	5,220	738,017	802,192	6,170
Extra-EU	645,489	4,765	645,127	608,610	4,957	643,637	699,605	6,038
Developing countries	219,068	4,124	228,159	215,245	4,413	238,355	259,082	5,303
<i>Leading importing countries in the EU</i>								
Germany	211,225	2,753	193,094	182,164	2,998	190,331	206,881	3,907
France	123,264	327	130,931	123,519	300	159,844	173,743	228
Italy	116,823	630	127,066	119,874	605	126,457	137,453	621

Source: Eurostat 2000

Figure 5.1 Leading suppliers of precious and semi-precious stones to the EU, 1998 – 2000, US\$ million



Source: Eurostat 2000

Contrary to the imports of diamonds, imports of other precious and semi-precious stones remained fairly constant in value during 1998 – 2000. However, import volumes increased by 22 percent in 2000 compared to 1998. It is assumed that larger supplies from producing countries reduced import prices during 1998 – 2000. Many importers arrange their transactions through offices in Switzerland. This concerns the financial and administrative import of precious and semi-precious stones, rather than the physical import of products. Switzerland is not a leading producer of precious and semi-precious stones.

The leading suppliers of precious and semi-precious stones to Belgium (share of total 2000 imports in terms of value)

- United Kingdom (25%), Israel (12%), USA (8%), India (7%), Congo Democratic Republic (6%), Angola (5%), South Africa (3%)

Although Belgium also imports other precious and semi-precious stones, these quantities are negligible compared to the imports of diamonds.

Belgium

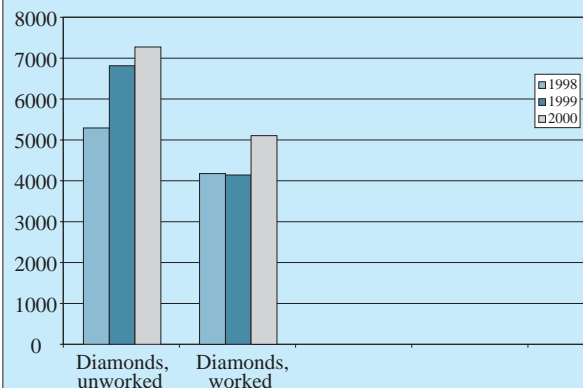
Belgium was by far the largest importer of precious and semi-precious stones in terms of value in 2000. The import value amounted to US\$12,424 (€ 13,504) million accounting for 59 percent of total EU imports. The major products that constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, unworked	7,271 (7,903)	59
Diamonds, worked	5,102 (5,546)	41

Belgium is the biggest importer and cutter/polisher of diamonds in the EU. One third of De Beers ‘sight holders’ is established in Antwerp, the diamond city of Belgium.

The bulk of the Belgian diamond trade is concentrated in and around the ‘Antwerp Diamond Exchange’, the biggest and most important diamond exchange in the EU. Imports showed a steady growth during the period under review.

Figure 5.2 Imports of precious and semi-precious stones into Belgium, 1998 – 2000, US\$ million



Source: Eurostat 2000

United Kingdom

In terms of value, United Kingdom was the second largest importer of precious and semi-precious stones in 2000. The import value amounted to US\$ 6,864 (€ 7,461) million, accounting for 33 percent of total EU imports. The major products which constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, unworked	5,967 (6,486)	87
Diamonds, worked	786 (854)	11

Due to De Beers being established in London, United Kingdom is together with Belgium the most important diamond market in the EU. De Beers almost entirely dominates the rough diamond trade. Cut diamonds are traded through 'The London Diamond Exchange' and through established dealers. United Kingdom used to be an important cutting centre for precious and semi-precious stones.

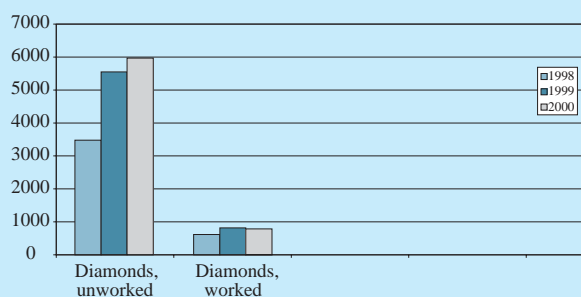
The leading suppliers of precious and semi-precious stones to United Kingdom (share of total 2000 imports in terms of value)

→ Switzerland (45%), South Africa (21%), Russia (8%), Belgium (6%), Botswana (6%)

The former colonies made it possible to obtain all kind of rough stones, which were brought to the UK for cutting. Today almost all cutting industry has moved to Asian countries. Although the United Kingdom imports other precious and semi-precious stones, these imports are negligible compared to the imports of diamonds.

Switzerland is not an important supplier, but is used as an intermediary by other countries.

Figure 5.3 Imports of precious and semi-precious stones into United Kingdom, 1998 – 2000, US\$ million



Source: Eurostat 2000

France

As the third country in the EU in terms of value, France imported precious and semi-precious stones for US\$ 535 (€ 582) million in 2000, which represented an import share of 3 percent of total EU imports. The major imported products which constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, worked	374 (407)	70
Rubies, sapphires, emeralds	98 (107)	18
Pearls, cultured, worked	20 (22)	4

Diamonds are traded through the 'Paris Diamond Exchange', which plays a minor role in comparison with the exchanges in Belgium and United Kingdom. The diamond market showed a stronger growth in France during 1998 – 2000 than the average growth in the EU.

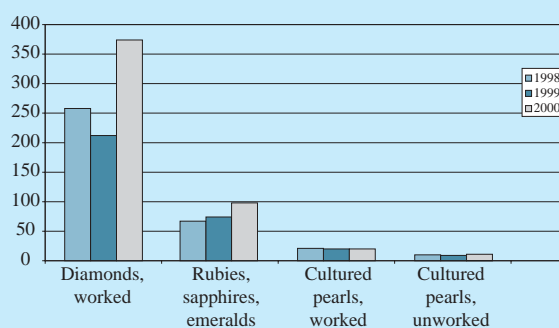
The leading suppliers of precious and semi-precious stones to France (share of total 2000 imports in terms of value)

→ Switzerland (36%), Belgium (25%), United Kingdom (7%), USA (6%), Thailand (2%)

Remarkable is the strong growth of the share of rubies, sapphires and emeralds in the total imports.

Switzerland is not an important supplier, but used as an intermediary for imports by other countries.

Figure 5.4 Imports of precious and semi-precious stones into France, 1998 – 2000, US\$ million



Source: Eurostat 2000

Italy

In terms of value, Italy was the fourth largest importer of precious and semi-precious stones in 2000.

The import value amounted to US\$ 485 (€ 527) million, accounting for 2 percent of total EU imports.

The major products which constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, worked	358 (389)	74
Pearls, cultured, worked	48 (52)	10
Rubies, sapphires, emeralds	36 (39)	7

The market for diamonds showed a growth below the EU average. Italy continues to work with larger volumes of cheaper (smaller) stones.

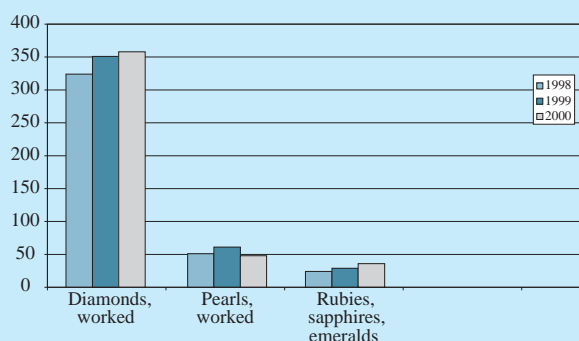
The leading suppliers of precious and semi-precious stones to Italy (share of total 2000 imports in terms of value)

→ Belgium (50%), Israel (13%), India (6%), Japan (4%), Thailand (4%), China (2%)

This can be explained by the fact that Italy remains one of the leading manufacturers of (gold) jewellery. A large quantity of small diamonds is used in this sector.

The market for the other products was stable during the period under review. The relatively high share of cultured pearls is remarkable.

Figure 5.5 Imports of precious and semi-precious stones into Italy, 1998 – 2000, US\$ million



Source: Eurostat 2000

Germany

In terms of value, Germany was the fifth largest importer of precious and semi-precious stones in 2000.

The import value amounted to US\$ 447 (€ 486) million, accounting for 2 percent of total EU imports.

The major products which constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, worked	256 (278)	57
Pearls, cultured, worked	65 (71)	15
Precious and semi-precious stones, worked	26 (28)	6
Rubies, sapphires and emeralds	24 (26)	5
Precious and semi-precious stones, unworked	22 (24)	5

The market for diamonds showed a steady decrease which already started at the end of the eighties. This was a direct effect of the weakening German economy after the unification of East and West Germany.

The leading suppliers of precious and semi-precious stones to Germany (share of total 2000 imports in terms of value)

→ Belgium (25%), Israel (13%), India (10%), Japan (7%), Switzerland (5%), Hong Kong (4%)

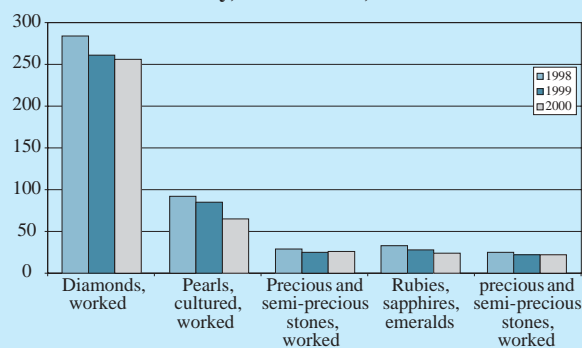
The market for the other products remained more or less stable during the period under review.

There is a clear trend towards cheaper products.

Although a larger public is attracted to the products, they spend less per consumer.

The relatively high share of cultured pearls in the total imports is remarkable.

Figure 5.6 Imports of precious and semi-precious stones into Germany, 1998 – 2000, US\$ million



Source: Eurostat 2000

The Netherlands

The Netherlands was the eighth largest importer of precious and semi-precious stones in 2000.

The import value amounted to US\$ 46 (€ 50) million, accounting for 0.2 percent of total EU imports.

Major imported products which constituted more than 90 percent of total imports in 2000 were:

Product	Import value in US \$ (€) million	Import share in %
Diamonds, worked	40 (43)	87
Pearls, cultured, worked	3 (3.3)	7

As seen in most markets, diamond sales are closely related to the economy.

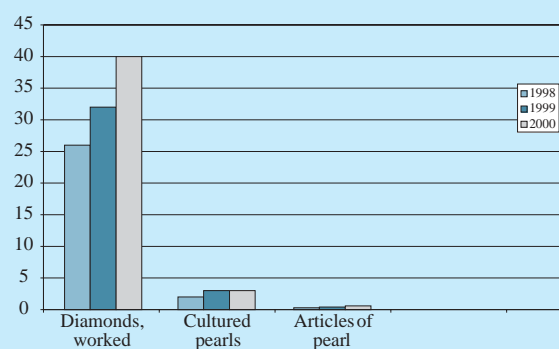
The leading suppliers of precious and semi-precious stones to The Netherlands (share of total 2000 imports in terms of value)

→ Belgium (59%), USA (13%), Israel (11%)

The diamond market showed a growth of about thirty percent as from 1996.

The market for the other products showed an above average growth during the period under review. This was mainly due to the growing segments of 'New Age' and 'decoration'.

Figure 5.7 Imports of precious and semi-precious stones into The Netherlands, 1998 – 2000, US\$ million



Source: Eurostat 2000

5.2 Imports by product group

Table 5.4 Imports of major precious and semi-precious stones per product group into the EU, 1998 – 2000, US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Diamonds, unworked	8,816,808	33	12,398,706	11,696,892	44	13,269,388	14,423,248	37
Extra-EU	6,399,555	26	9,170,774	8,651,674	37	10,093,650	10,971,359	31
DC	2,055,725	3	3,218,209	3,036,046	9	4,400,044	4,782,656	8
Diamonds, worked	5,762,316	19	5,901,741	5,567,680	30	7,011,458	7,621,150	182
Extra-EU	4,392,210	1	4,490,279	4,236,112	1	5,548,613	6,031,101	1
DC	1,593,706	1	1,682,940	1,587,679	1	1,888,279	2,052,477	1
Rubies, sapphires and emeralds, worked	229,421	7	233,552	220,332	22	238,046	258,746	3
Extra-EU	210,248	6	212,790	200,745	2	214,237	232,866	1
DC	101,045	1	104,399	98,490	2	90,588	98,465	1
Cultured pearls, worked	219,444	100	236,181	222,812	84	196,014	213,059	54
Extra-EU	201,242	44	216,480	204,226	76	182,057	197,888	51
DC	14,999	10	18,600	17,547	29	18,857	20,497	17
Precious and semi-precious stones, worked	90,360	1,096	92,278	87,055	1,098	94,796	103,039	1,333
Extra-EU	66,223	1,045	69,073	65,163	1,082	72,599	78,912	1,313
DC	38,737	949	40,445	38,156	997	46,898	50,976	1,227
Precious and semi-precious stones, unworked	42,461	2,548	37,516	35,392	2,775	38,026	41,333	2,554
Extra-EU	39,548	2,461	33,123	31,248	2,586	33,672	36,600	2,484
DC	28,625	2,126	25,923	24,456	2,320	27,510	29,902	2,181
Cultured pearls, unworked	37,408	8	33,265	31,382	23	37,254	40,493	9
Extra-EU	34,853	3	31,395	29,618	22	33,770	36,706	9
DC	1,522	1	1,836	1,732	19	2,305	2,505	2
Articles of natural or cultured pearls	37,220	57	31,198	29,432	25	32,682	35,524	82
Extra-EU	32,001	52	26,602	25,096	23	26,625	28,940	70
DC	5,966	32	5,634	5,315	14	7,315	7,951	44

Source: Eurostat 2000

DC = Developing countries

Developing countries supplied 72 percent of unworked precious and semi-precious stones in value in 2000.

Regarding articles made wholly of precious and semi-precious stones and worked precious and semi-precious stones, developing countries supplied 60 respectively 49 percent in value to EU countries in 2000.

5.2.1 Diamonds, unworked

Diamonds, unworked, constitute by far the biggest import market of precious and semi-precious stones. Between 1998 and 2000, imports of unworked diamonds by EU member countries increased from US\$ 8.8 (€ 7.9) billion to US\$ 13.3 (€ 14.5) billion, an increase of 51 percent. Belgium is the leading importer, accounting for 55 percent of total imports (in value) by EU member countries in 2000, followed by United Kingdom (45%).

Imports from developing countries amounted to 33 percent of the total value imported in 2000.

South Africa, Congo Democratic Republic, Angola, Botswana, Central African Republic and Guinea were the main developing countries supplying EU countries. They accounted for US\$ 3.8 (€ 4.1) billion in value of imports in 2000 and represented 29 percent of total imports.

5.2.2 Diamonds, worked

Diamonds, worked, are the second largest product group of precious and semi-precious stones imported in the EU. This group showed a substantial growth: from US\$ 5.7 (€ 5.1) billion in 1998 to US\$ 7 (€ 7.6) billion in 2000, an increase of 22 percent.

Belgium was the leading importing country, accounting for 73 percent of total imports followed by United Kingdom (11%) and France (5%).

Imports from developing countries accounted for 27 percent of total imports. India, China, Thailand, Sri Lanka and South Africa were the leading developing countries supplying the EU. They accounted for 24 percent of total EU imports in value in 2000.

The leading suppliers of unworked diamonds to the EU from developing countries (share of total 2000 imports in terms of value)

→ South Africa (14%), Congo Democratic Republic (5%), Angola (5%), Botswana (3%)

The leading suppliers of worked diamonds to the EU from developing countries (share of total 2000 imports in terms of value)

→ India (15%), China (4%), Thailand (2%), Sri Lanka (2%), South Africa (2%)

Table 5.5 Imports of unworked diamonds into the EU, 1998-2000
US\$ 1,000/ € 1,000/ tonss

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Total	8,816,808	33	12,398,706	11,696,892	44	13,269,388	14,423,248	37
Extra-EU	6,399,555	26	9,170,774	8,651,674	37	10,093,650	10,971,359	31
Developing countries	2,055,725	3	3,218,209	3,036,046	9	4,400,044	4,782,656	8
<i>Leading importing countries in the EU</i>								
Belgium &								
Luxembourg	5,292,185	20	6,813,311	6,427,652	25	7,271,145	7,903,419	21
United Kingdom	3,477,092	13	5,549,999	5,235,848	19	5,967,100	6,485,978	16

Source: Eurostat 2000

Table 5.6 Imports of worked diamonds into the EU, 1998-2000
US\$ 1,000/ € 1,000/ tons

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Total	5,762,316	19	5,901,741	5,567,680	30	7,011,458	7,621,150	182
Extra-EU	4,392,210	1	4,490,279	4,236,112	1	5,548,613	6,031,101	1
Developing countries	1,593,706	1	1,682,940	1,587,679	1	1,888,279	2,052,477	1
<i>Leading importing countries in the EU</i>								
Belgium & Luxembourg	4,177,719	1	4,140,571	3,906,199	1	5,102,353	5,546,036	1
United Kingdom	617,279	1	817,297	771,035	16	786,444	854,830	0

Source: Eurostat 2000

5.2.3 Rubies, sapphires and emeralds, worked

The EU imports of worked rubies, sapphires and emeralds amounted to US\$ 238 (€ 259) million in 2000; an increase of 2 percent compared to 1999.

The largest importing country in 2000 was France with US\$ 98 (€ 107) million, accounting for 41 percent of total EU imports, followed by Belgium with US\$ 39 (€ 42) million (16%), Italy with US\$ 36 (€ 39) million (15%) and United Kingdom with US\$28 (€ 30) million (12%).

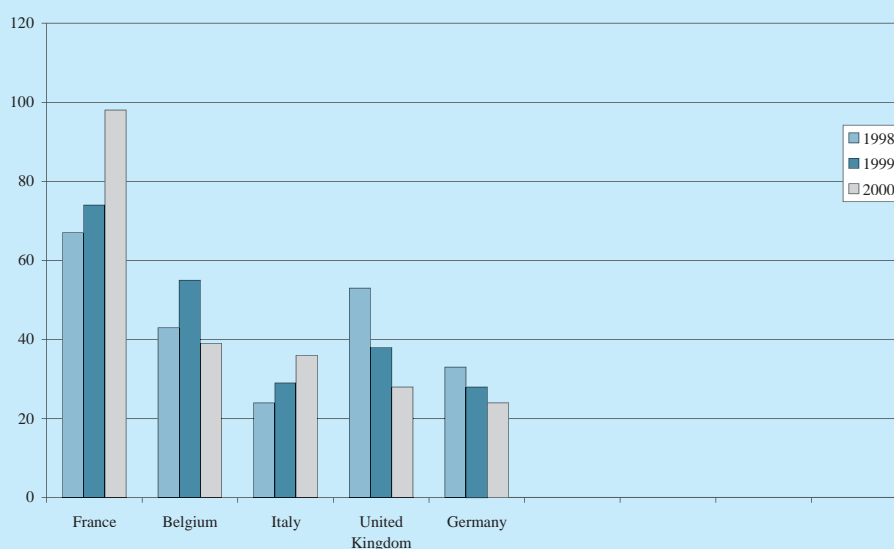
Together these countries accounted for 84 percent of total EU imports. Imports from developing countries accounted for US\$ 91 (€ 99) million in 2000; an import share of 38 percent.

Thailand was the largest supplier from developing countries, accounting for US\$ 56 (€ 61) million, followed by India with US\$ 12 (€ 13) million.

The leading suppliers of rubies, sapphires and emeralds, worked, to the EU from developing countries (share of total 2000 imports in terms of value)

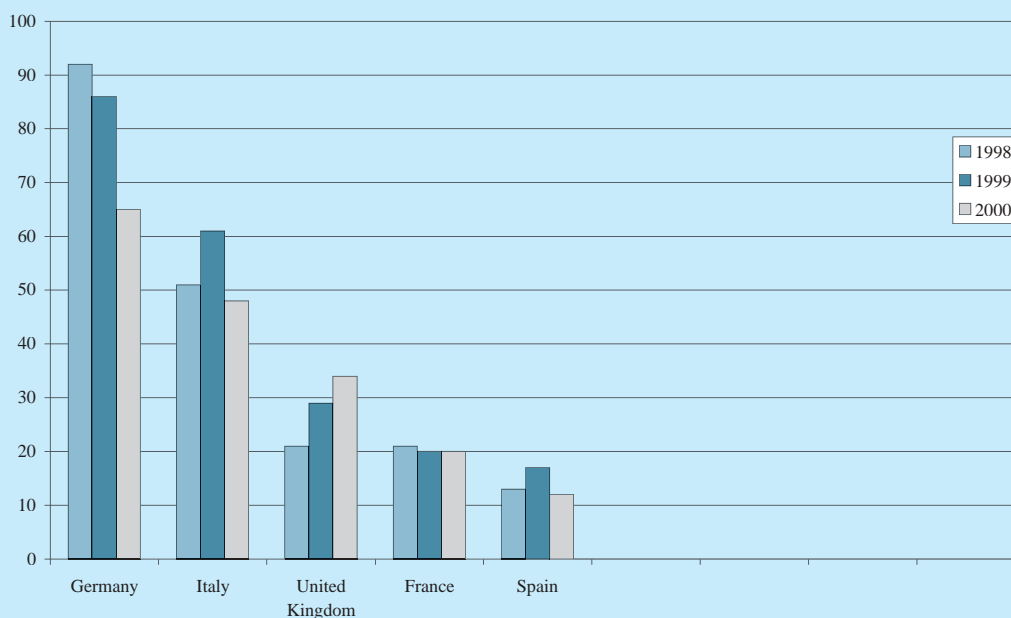
→ Thailand (24%), India (5%), Colombia (4%), Sri Lanka (4%)

Figure 5.8 Imports of rubies, sapphires and emeralds, worked, into the main EU countries, 1998 – 2000, US\$ million



Source: Eurostat 2000

Figure 5.9 Imports of cultured pearls, worked, into the main EU countries, 1998 – 2000, US\$ million



Source: Eurostat 2000

5.2.4 Cultured pearls, worked

The EU import market for cultured pearls, worked, amounted to US\$ 233 (€ 253) million in 2000.

Worked cultured pearls constituted the largest segment with an import value of US\$ 196 (€ 213) million in 2000 (84%).

After an increase of 8 percent in 1999, imports decreased by 17 percent in value in 2000 and were 10 percent lower than the import value in 1998 (US\$ 219/€ 196 million). The import market for unworked pearls was rather stable, with an import value of US\$ 37 (€ 40) million in 2000.

The largest importing countries in 2000 of worked cultured pearls were Germany with US\$ 65 (€ 71) million (33%), Italy with US\$ 48 (€ 52) million (24%), United Kingdom with US\$ 34 (€ 37) million (17%) and France with US\$ 20 (€ 21.7) million (10%).

Together they accounted for 84 percent of total imports of worked cultured pearls.

The leading suppliers of cultured pearls, worked to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (8%), French Polynesia (6%)

5.2.5. Precious and semi-precious stones, worked

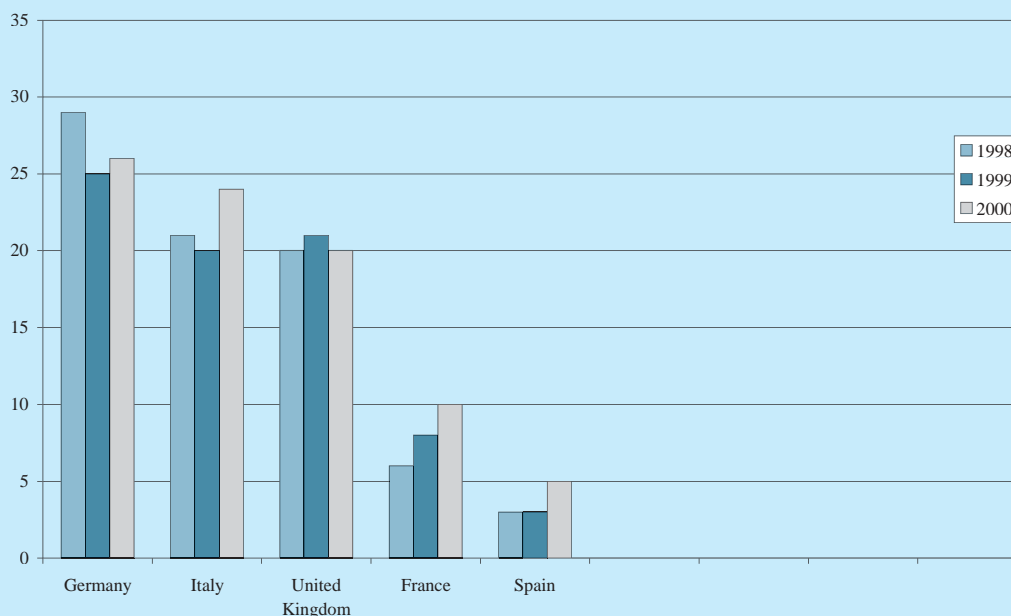
Imports into the EU showed a consistent increase during the period 1998 – 2000. The import value in 2000 increased by 3 percent compared to 1999 and reached a value of US\$ 95 (€ 103) million.

The largest importing countries in 2000 were Germany with US\$ 26 (€ 28.3) million (28%), Italy with US\$ 24 (€ 26) million (26%) and United Kingdom with US\$ 20 (€ 21.7) million (21%). These countries accounted for 75 percent of total EU imports.

The leading suppliers of precious and semi-precious stones, worked to the EU from developing countries (share of total 2000 imports in terms of value)

→ Thailand (17%), India (14%), Brazil (8%), China (5%), Sri Lanka (2%)

Figure 5.10 Imports of precious and semi-precious stones, worked, into the main EU countries, 1998 – 2000, US\$ million



Source: Eurostat 2000

5.2.6 Precious and semi-precious stones, unworked

The import of unworked precious and semi-precious stones into the EU declined sharply in value in 1999 by 12 percent compared to 1998, but recovered somewhat in 2000 when US\$ 38 (€ 41) million was imported: an increase of 1 percent compared to 1999.

Germany was the largest importing country with US\$ 22 (€ 24) million (58%), followed by Austria with US\$ 5 (€ 5.4) million (24%) and Italy with US\$ 3 (€ 3.3) million (7%). These countries accounted for 90 percent of total EU imports.

The leading suppliers of precious and semi-precious stones, unworked, to the EU from developing countries (share of total 2000 imports in terms of value)

→ Brazil (25%), Nigeria (11%), Thailand (5%), Kenya (5%), Tanzania (4%), Pakistan (4%), Madagascar (4%)

Table 5.7 Imports of precious and semi-precious stones, unworked, into the main EU countries, 1998 – 2000, US\$ 000/€ 000/ tons

	1998		valueUS\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	42,461	2,548	37,516	35,392	2,775	38,026	41,333	2,554
Extra-EU	39,548	2,461	33,123	31,248	2,586	33,672	36,600	2,484
Developing countries	28,625	2,126	25,923	24,456	2,320	27,510	29,902	2,181
<i>Leading importing countries in the EU</i>								
Germany	25,300	1,743	21,585	20,363	1,866	21,916	23,822	1,926
Austria	5,855	146	4,904	4,626	116	5,188	5,639	71
Belgium	1,663	13	1,592	1,502	13	2,571	2,795	13

Source: Eurostat 2000

Table 5.8 Imports of cultured pearls, unworked, into the main EU countries, 1998 – 2000, US\$ 000/€ 000/ tons

	1998		valueUS\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	37,408	8	33,265	31,382	23	37,254	40,493	9
Extra-EU	34,853	3	31,395	29,618	22	33,770	36,706	9
Developing countries	1,522	1	1,836	1,732	19	2,305	2,505	2
<i>Leading importing countries in the EU</i>								
France	9,661	1	9,413	8,880	16	11,054	12,015	0
Germany	7,678	1	8,644	8,155	2	8,622	9,372	2
United Kingdom	12,058	3	7,739	7,301	1	6,576	7,148	0

Source: Eurostat 2000

5.2.7 Cultured pearls, unworked

The imports of unworked, cultured pearls were stable during the period under review with an import value of US\$ 37 (€ 40.2) million in 2000.

After a dip in 1999 (US\$ 33 / € 31 million), the import value increased to the same level compared to 1998. France was the largest importing country in 2000 with US\$ 11 (€ 11.9) million (30%), followed by Germany with US\$ 9 (€ 9.8) million (23%) and United Kingdom with US\$ 7 (€ 7.6) million (18%).

Together these countries accounted for 71 percent of total EU imports.

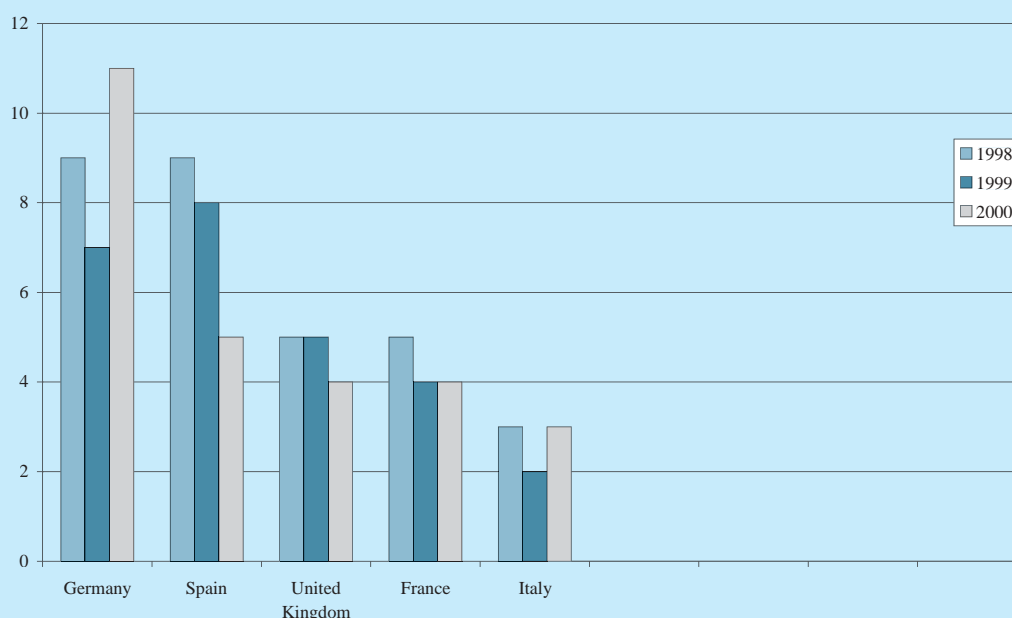
The leading suppliers of cultured pearls, unworked, to the EU from developing countries (share of total 2000 imports in terms of value)

→ French Polynesia (15%), China (4%)

5.2.8 Articles of natural or cultured pearls

After a decline in value of 12 percent in 1999 compared to 1998, the imports increased in 2000 to a level of US\$ 33 (€ 35.9) million, an increase of 4.8 percent compared to 1999.

Figure 5.11 Imports of articles of natural or cultured pearls into the main EU countries, 1998 – 2000, US\$ million



Source: Eurostat 2000

Germany was the largest importing country with US\$ 11 (€ 11.9) million (34%), followed by Spain with US\$ 5 (€ 5.4) million (14%), United Kingdom with US\$ 4 (€ 4.3) million (14%) and France with US\$ 4 (€ 4.3) million (14%). Together these countries accounted for 76 percent of total EU imports.

The leading suppliers of articles of natural or cultured pearls to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (22%), French Polynesia (1%)

5.2.9 Articles made wholly of precious and semi-precious stones, excluding 7116.2011

The import value of this group showed a substantial increase in value in 2000: from US\$ 23 (€ 21.7) million in 1999 to US\$ 31 (€ 33.7) million in 2000.

Germany was the largest importing country with a value of US\$ 13 (€ 14.1) million in 2000 (43%), followed by France with US\$ 5 (€ 5.4) million (17%) and Italy with US\$ 4 (€ 4.3) million (13%). Together these countries accounted for 73 percent of total EU imports.

The leading suppliers of articles made wholly of precious and semi-precious stones to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (41%), Thailand (7%), India (3%), Brazil (3%)

5.2.10 Articles made of precious and semi-precious stones, natural, synthetic or reconstructed, excluding 7116.2011 and 7116.2019

After a peak in value in 1998 of US\$ 42 (€ 37.5) million, imports decreased to a level of US\$ 30 (€ 32.6) million in 2000.

Germany was the largest importing country with US\$ 9 (€ 9.8) million (29%), followed by France with US\$ 7 (€ 7.6) million (23%) and United Kingdom with US\$ 4 (€ 4.3) million (12%). These countries accounted for 64 percent of total EU imports.

The leading suppliers of articles made of precious and semi-precious stones, natural, synthetic or reconstructed to the EU from developing countries (share of total 2000 imports in terms of value)

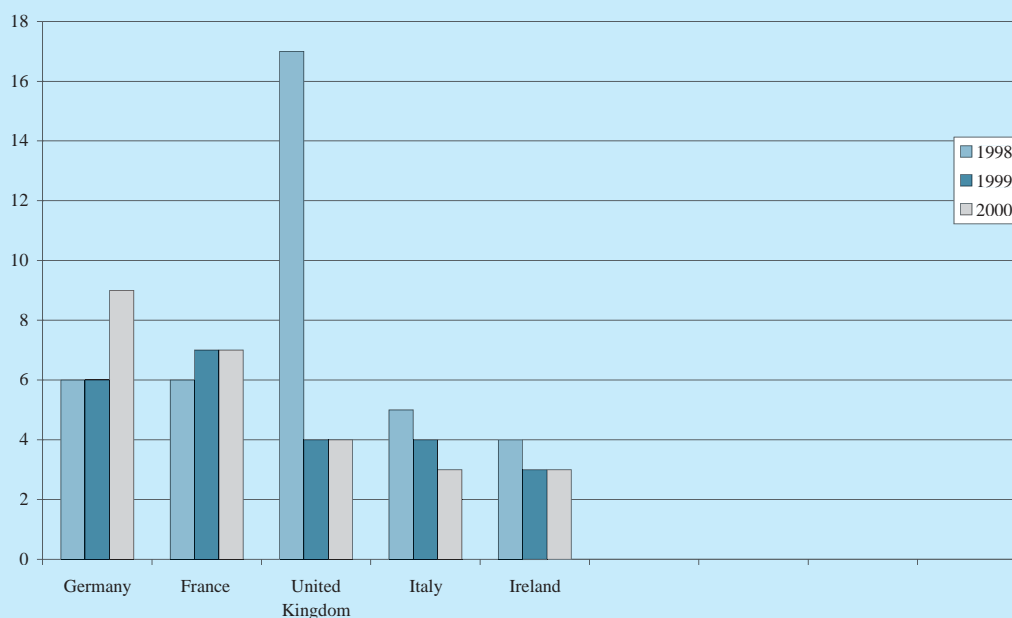
→ China (22%), Thailand (13%), Brazil (7%), India (3%)

Table 5.9 Imports of articles made wholly of precious and semi-precious stones, excluding 7116.2011 into the main EU countries, 1998 – 2000, US\$ 000/€ 000/ tons

	1998		valueUS\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	19,990	614	23,328	22,008	672	30,808	33,487	975
Extra-EU	16,675	601	17,043	16,078	665	25,110	27,294	963
Developing countries	12,619	563	13,104	12,362	616	18,598	20,215	865
<i>Leading importing countries in the EU</i>								
Germany	5,614	187	5,796	5,468	240	13,391	14,555	453
France	5,991	157	5,508	5,196	82	5,245	5,701	77
Italy	2,203	66	2,601	2,454	111	3,948	4,291	112

Source: Eurostat 2000

Figure 5.12 Imports of articles of precious and semi-precious stones, natural, synthetic or reconstructed into the main EU countries, 1998 – 2000, US\$ million



Source: Eurostat 2000

5.2.11 Necklaces, bracelets and other articles, wholly of natural precious or semi-precious stones

After a small dip in 1999, the imports of necklaces, bracelets and other articles almost doubled to a level of US\$ 24 (€ 26) million in 2000.

Germany was the largest importing country with US\$ 11 (€ 12) million (45%), followed by Italy with US\$ 3 (€ 3.3) million (12%) and Spain with US\$ 3 (€ 3.3) million (12%). Together, these countries accounted for almost 70 percent of total EU imports.

The leading suppliers of necklaces, bracelets and other articles to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (26%), India (19%)

Table 5.10 Imports of necklaces, bracelets and other articles, wholly of natural or semi-precious stones, into the main EU countries, 1998 – 2000, US\$ 000/€ 000/ tons

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Total	13,600	114	12,160	11,472	88	23,945	26,027	276
Extra-EU	8,726	99	8,098	7,640	87	19,049	20,705	272
Developing countries	4,619	80	5,271	4,973	71	11,081	12,045	185
<i>Leading importing countries in the EU</i>								
Germany	3,333	23	4,103	3,871	32	10,733	11,666	143
Italy	3,161	35	2,930	2,764	29	2,763	3,003	41
Spain	999	21	685	646	11	2,602	2,828	47

Source: Eurostat 2000

5.2.12 Natural pearls

Natural pearls accounted for an import value of US\$ 16 (€ 17.4) million in 2000 and showed a steady increase: from US\$ 11 (€ 9.8) million in 1998 to US\$ 16 (€ 17.4) million in 2000.

United Kingdom was by far the biggest importing country in 2000: US\$ 9 (€ 9.8) million (56%), followed by France with US\$ 1.8 (€ 2) million (11%) and Spain with US\$ 1.3 (€ 1.4) million (8%).

These three countries accounted for 75 percent of total EU imports.

The leading suppliers of natural pearls to the EU from developing countries (share of total 2000 imports in terms of value

→ China (3%), French Polynesia (1%)

Table 5.11 Imports of natural pearls into the EU, 1998 – 2000, US\$ 1,000/ € 1,000/ tons

	1998		valueUS\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	10,995	79	13,860	13,075	22	16,157	17,562	28
Extra-EU	9,178	74	9,875	9,316	15	13,484	14,656	28
Developing countries	1,073	1	1,374	1,296	1	690	750	9
<i>Leading importing countries in the EU</i>								
United Kingdom	4,044	2	6,017	5,676	1	9,054	9,841	2
France	586	0	596	562	7	1,820	1,978	0
Spain	1,707	9	1,331	1,256	12	1,298	1,411	23
Ireland	35	2	2,404	2,268	0	979	1,064	0
Italy	3,070	63	1,555	1,467	2	639	695	3

Source: Eurostat 2000

5.3 The role of the developing countries

Between 1998 and 2000, imports of precious and semi-precious stones from developing countries increased on a value basis from US\$ 3.868 (€ 3.454) billion in 1998 to US\$ 6.527 (€ 7.095) billion in 2000.

The import share of developing countries in total EU imports showed a constant increase:

	1998	1999	2000
Import share in value	25%	27%	31%

Figure 5.13 Share of developing countries in imports of precious and semi-precious stones into selected EU countries, 1998-2000, % of imported value

Product groups	Main developing country suppliers (share in % of imported value supplied by developing countries, 2000)	Share DCs of total imported value, 2000
Diamonds, unworked	→ South Africa (14%), Congo Democratic Republic (5%), Angola (5%), Botswana (3%)	33%
Diamonds, worked	→ India (15%), China (4%), Thailand (2%), Sri Lanka (2%), South Africa (2%)	27%
Rubies, sapphires and emeralds, worked	→ Thailand (24%), India (5%), Colombia (4%), Sri Lanka (4%)	38%
Cultured pearls, worked	→ China (8%), French Polynesia (6%)	10%
Cultured pearls, unworked	→ French Polynesia (15%), China (4%)	6%
Precious and semi-precious stones, unworked	→ Brazil (25%), Nigeria (11%), Thailand (5%), Kenya (5%), Tanzania (4%), Pakistan (4%), Madagascar (4%)	72%
Precious and semi-precious stones, worked	→ Thailand (17%), India (14%), Brazil (8%), China (5%), Sri Lanka (2%)	49%
Articles of natural or cultured pearls	→ China (22%), French Polynesia (1%)	22%
Articles made wholly of precious and semi-precious stones	→ China (41%), Thailand (7%), India (3%), Brazil (3%)	60%
Articles made of precious and semi-precious stones, natural, synthetic or reconstructed	→ China (22%), Thailand (13%), Brazil (7%), India (3%)	48%
Necklaces, bracelets, others	→ China (26%), India (19%)	46%
Natural pearls	→ China (3%), French Polynesia (1%)	4%

Source: Eurostat, 2000

DCs = Developing countries

6 EXPORTS

**Table 6.1 EU exports of precious and semi-precious stones, 1998-2000,
US\$ 1,000 / € 1,000 / tons**

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Total	14,173,686	561	17,462,376	16,473.940	2,444	18,924,989	20,570,640	1,297
Belgium & Luxembourg	10,203,308	46	12,018,470	11,338,179	35	12,696,557	13,800,605	25
United Kingdom	3,412,388	68	4,830.116	4,556,713	1,489	5,661,236	6,153,517	75
Germany	290,371	258	350,534	330,692	596	293,446	318,963	928
France	129,474	26	119,626	112,855	143	155,012	168,491	21
Italy	27,196	114	36,531	34,463	86	42.301	454,979	190
Portugal	63,647	0	49,335	46,542	0	29,056	31,583	0
Austria	12,772	6	11,176	10,543	18	13,525	14,701	8
The Netherlands	13,466	8	15,454	14,579	29	11,560	12,565	0
Spain	8,558	24	8,903	8,399	21	8,492	9,230	12
Denmark	2,798	0	3,767	3,554	1	3,995	4,342	0
Ireland	43	0	11,621	10,963	8	3,911	4,251	0
Sweden	7,805	7	5,038	4,753	5	3,630	3,946	21
Greece	1,645	0	212	200	6	322	350	5
Finland	220	4	86	81	7	130	141	0

Source: Eurostat 2000

In 2000, the leading exporting countries were Belgium, United Kingdom and Germany. They exported almost 100 percent of total exports by EU member countries. Most of the trade is extra-EU oriented (70 percent of total exported value).

**Table 6.2 EU exports of precious and semi-precious stones to major destinations, 1998 –2000,
US\$ 1,000 / € 1,000 / tons**

	1998		1999			2000		
	value US\$	volume	valueUS\$	value €	volume	value US\$	value €	volume
Total	14,173,686	561	17,462,376	16,473.940	2,444	18,924,989	20,570,640	1,297
Extra-EU	10,492,580	318	12,740,567	12,019,403	721	14,423,569	15,677,792	1,011
India	2,851,732	59	3,731,060	3,519,868	145	3,861,557	4,197,345	325
Israel	2,514,929	1	3,335,063	3,146,286	2	3,514,245	3,819,832	1
USA	2,419,917	34	2,562,467	2,417,422	87	3,078,839	3,346,564	78
Belgium& Luxembourg			2,731,431	2,576,822	641	2,647,705	2,877,941	13
Switzerland	676,997	22	607,403	573,022	23	1,078,993	1,172,818	24
Hong Kong	580,450	58	762,319	719,169	238	815,095	885,973	339
United Kingdom	608,424	41	754,336	711,638	53	611,472	664,644	45

Source: Eurostat 2000

The largest destinations of intra-EU exports in 2000 in terms of volume were:

Country	Value in US\$ (€) million
• Belgium	2,646 (2,876)
• United Kingdom	611 (664)
• Italy	394 (428)
• France	364 (396)
• Germany	211 (229)
• Spain	88 (96)

The above-mentioned countries represented 85 percent of total intra-EU imports in 2000.

7 TRADE STRUCTURE

7.1 EU trade channels

Due to the enormous diversity in precious and semi-precious stones and the dominance of diamonds, the trade structure in the EU depends on the product group and final customer. The trade structure is best described based on the following product groups:

7.1.1 Diamonds

7.1.2 Cut precious and semi-precious stones, including pearls but excluding diamonds

7.1.3 Articles made of precious and semi-precious stones (necklaces, bracelets, carvings)

7.1.4 Minerals (precious and semi-precious stones) for collection

7.1.5 Semi-precious stones for decorative purposes

7.1.1 Diamonds

'De Beers Consolidated Mines' in South Africa heavily influences the trade structure of diamonds. For a century they have kept firm control over the supply and price setting of diamonds worldwide. It is often called 'the world's most successful cartel'.

De Beers owns mines, mostly in South Africa, and purchases production of mines around the world. They control nearly 60 percent of the trade in rough diamonds.

De Beers' Central Selling Organisation (CSO) is the marketing channel, which sells rough diamonds to strictly selected buyers, called 'sight holders', at fixed prices. These wholesalers purchase mixed lots which they sort, evaluate, trade or process as they see fit.

However, as from the mid-nineties De Beers lost power. Mines in Australia are constantly increasing their supply of rough diamonds. Besides, new discoveries are being made such as the deposits in Canada's Northwest Territories which are rich in gem-quality stones. Moreover, the mines in the Siberian province of Yakutia produce about 25 percent of the world's rough stones in terms of value.

Diamonds are sold through the following retail outlets:

- *jewellers*
specialised stores selling a wide range of jewellery products like rings, necklaces and bracelets. Watches often form part of the product range. The service is very personal; secluded tables and chairs are nearly always provided, where the jeweller can advise customers in privacy. Jewellers are often individually owned, but jeweller's chains also exist.

- *department stores*
part of large retail chains, department stores sell a wide variety of non-food products. They usually have a section where jewellery products are sold. The service is less professional and personal. The jewellery products are often lower priced compared to specialised jewellers and appeal more to a larger public.
- *gold and silversmiths*
specialised stores where the gold and silversmith prepares jewellery products according to the wishes of customers.
- *diamond traders/cutters* who sell retail as a side activity. The larger traders and cutters often have a retail outlet attached to their premises, where they sell their products. Customers are often tourists who can make a factory tour to look at the cutting, polishing and shaping of diamonds. The tour is concluded with a visit to the shop.

7.1.2 Cut precious and semi-precious stones, excluding diamonds

Most imports go through a few wholesalers, while some larger retailers also import directly. The main retail outlets are:

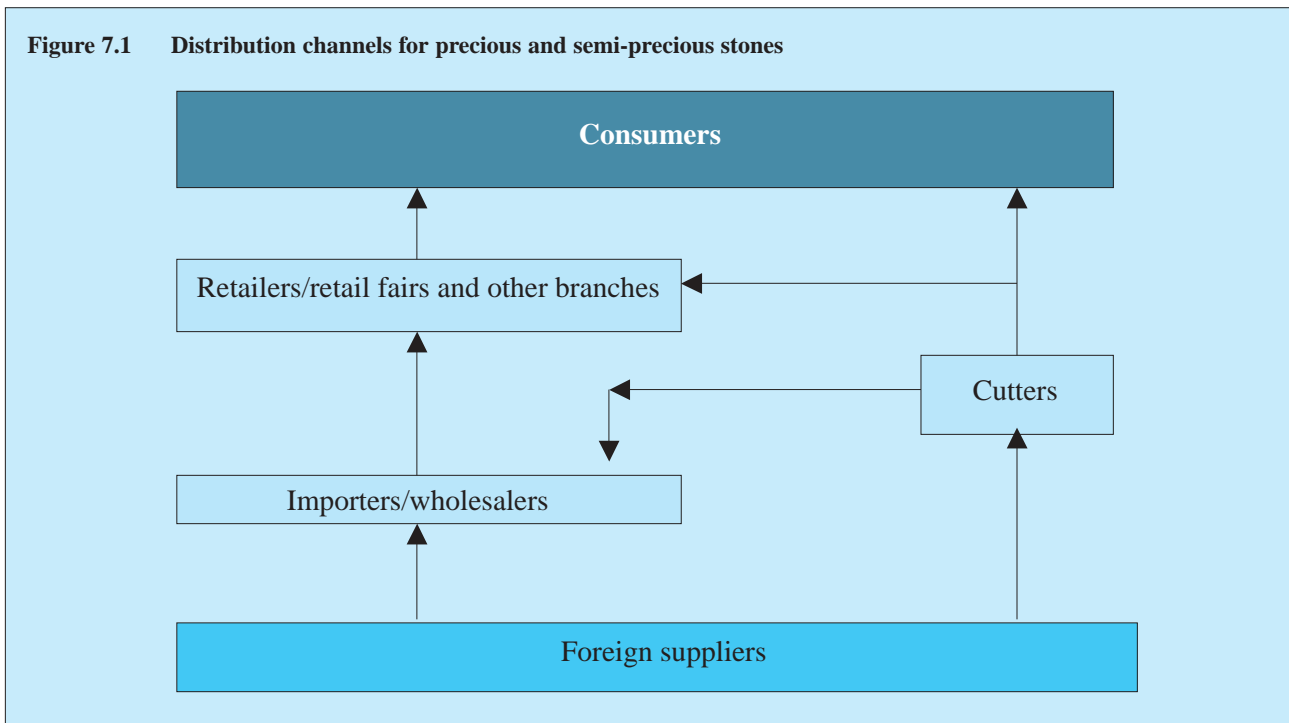
- rock shops
- specialised retail outlets where a wide variety of cut precious and semi-precious stones is displayed; diamonds are not sold in these outlets
- jewellers
- gold and silversmiths.

7.1.3 Articles made of precious and semi-precious stones

The same distribution channels apply as in 7.1.2. However, these articles are also sold in gift shops and New Age stores. Gift shops sell a wide variety of different products. The name is somewhat misleading as gift shops often sell upmarket articles for personal use like paperweights, ashtrays, scarves, articles of silver, picture frames, etc. Prices are generally higher compared to department stores.

New Age stores sell minerals with supposed therapeutic properties. Due to the very specialised market for these products, the number of New Age shops is rather limited.

Figure 7.1 Distribution channels for precious and semi-precious stones



7.1.4 Minerals for collection

Most imports go through a few specialised wholesalers. The main retail outlets are:

- rock shops
- mineral fairs
mineral fairs are organised regularly by associations active in the importation of minerals. Customers can visit these fairs and purchase directly from the exhibitors at the fair.

7.1.5 Semi-precious stones for decorative purposes

Most imports go through a few wholesalers. The main retail outlets are:

- rock shops
- gift shops
- department stores
- flower/garden decorator shops
- semi-precious stones are increasingly used for decoration purposes of gardens and in the preparation of flower sets.

The importers of products under 7.1.3 , 7.1.4 and 7.1.5 are usually the same.

In the flow diagramme above, a distinction should be made between diamonds and other precious and semi-precious stones. The distribution chain for diamonds is a rather closed one and is centred around the diamond exchanges of Antwerp and London. Importing and cutting are usually combined in one company.

The distribution is more open for all the other precious and semi-precious stones. A number of independent importers/wholesalers imports these products according to their specialisation.

7.2 Distribution channels for developing country exporters

The most suitable distribution channels for developing country exporters depend entirely on the type of precious and semi-precious stones an exporter intends to sell on the EU market.

If it is diamonds, exporters from developing countries are advised to contact the Diamond High Council in Antwerp. Their Public Relations department offers assistance to both buyers and sellers in contacting prospective importers.

Visiting trade fairs is good for one’s market orientation for all other precious and semi-precious stones, however, not all the major importers will be present here. Some of the bigger players choose to operate more ‘back stage’.

Therefore it is advisable to:

- select the potentially best importer for the type of products;
- contact them personally, as these forms of contact are very important in the sector;
- importers prefer to deal with the source directly. Therefore it is important to bring pictures of the mine, the factory, the trucks, to show the importer he is dealing with a source instead of a middleman;
- bring samples to show; a few kilograms for smaller quantities. The importers can evaluate the samples before deciding to buy.

8 PRICES AND MARGINS

8.1 Prices and margins

Diamonds

Prices for diamonds are determined by De Beers, still the world's major supplier of rough diamonds. The price level set by De Beers influences the diamond prices on the major EU Diamond Exchanges in London and Antwerp. Contracts are made up in US dollars.

The market can be divided into small diamonds (less than two carat) and large diamonds (more than two carat) for both prices and margins.

Small diamonds

Most diamonds belong to this group. The jewellery industry is the main customer for this group. Trading is done in large quantities, so margins are relatively low. The declining power of De Beers made it possible for new mining companies to enter the market. Due to growing supply, the price level is slowly decreasing.

Large diamonds

This specialised segment constitutes only a small part of the market. Large diamonds are unique and valued to their specific size and quality. Due to the much smaller size of the market, margins are higher than those for small diamonds.

Wholesalers or traders at diamond exchanges keep stock for retailers. Large diamonds are bought for jewellery or as investments.

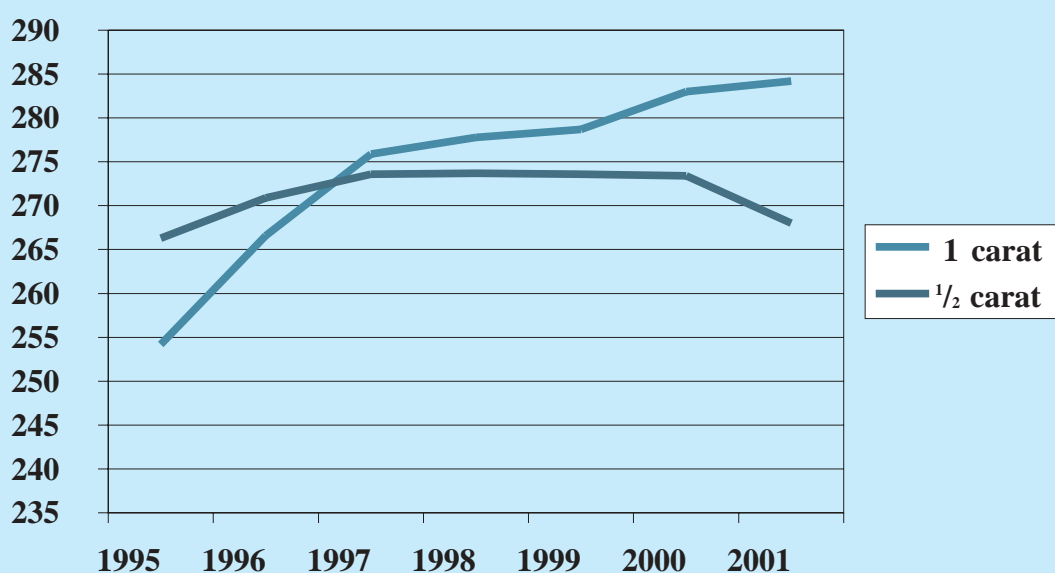
Prices are determined by supply and demand. Wholesalers work with margins between twenty and eighty percent; retailers work with margins between a hundred and a hundred and fifty percent, depending on their purchase prices.

8.2 Sources of price information

Diamonds

The most accepted and accurate listing of diamond prices is The Martin Rapaport. A second source of price information is the Antwerp Diamond Index, published by the High Council for Diamonds (HRD) in Antwerp. They publish average monthly prices for 1 and 1/2 carat diamonds. Information is available on the website of the HRD: www.diamonds.be

Figure 8.1 Annual average prices of diamonds in US\$, per 1 and 1/2 carat, 1995 - 2001



Source: High Council for Diamonds

9 OPPORTUNITIES FOR EXPORTERS

As the cost of labour in the EU is very high, countries with a lower wage structure are in a good position to produce articles of stones for the EU market.

Production of articles of stones has been shifted from EU countries to developing countries. Exporters in these countries are well positioned to supply the EU market with end products, providing they meet the following requirements:

- To comply to the wishes of the importers. EU importers supply their products to quality- and price-conscious consumers. They know the exact demands of the market in terms of style, material to be used, colour of stones, sizes and forms. EU importers are well positioned to translate these requirements to their suppliers. They demand strict adherence to their requirements, as any deviations may lead to problems in selling and subsequent discounts, in order to move the goods.
- To concentrate on stones with simple cutting forms. In order to supply to the EU market, exporters in developing countries are advised to start with simple cutting forms in order to gain experience. When their products are well accepted by customers in the EU, they can move into more complicated cutting forms.
- To comply with quality demands from EU buyers. Due to increasing spending power, consumers in the EU are willing to pay good prices for precious and semi-precious stones, providing the quality matches their requirements. Further, increased competition from exporters in developing countries makes it necessary for an exporter to supply quality in order to keep supplying to EU markets.

- To supply exactly the same quality as EU producers. EU producers are highly skilled in the craft of transforming unworked precious and semi-precious stones to end products desired by consumers. Suppliers to the retail sector in the EU are only willing to transfer production to developing countries when they are sure exporters in these countries match the same quality levels that apply to EU producers.
- To be well informed on requirements of packaging, sizes and quantities before starting production. As precious and semi-precious stones are sold in a large variety of colours, shapes, styles and sizes, exporters in developing countries should be well informed about the required assortment. In this way they can better match the requirements of EU importers and prevent mistakes in the production.
- Exporters who start on a small-scale basis are usually better equipped for export compared to exporters who intend to start with large-scale production. By starting on a small scale, exporters can gain experience in supplying EU customers and become better equipped to control their operations and to prevent mistakes in production.

Please refer also to the EU Strategic Marketing Guide 'Precious and semi-precious stones'.

APPENDIX 1 DETAILED HS CODES

The products in Section 2.1 have the following detailed HS (Harmonised System) codes:

HS code	Description
7101.1000	Pearls, natural, whether or not worked or graded, but not strung, mounted or set, ungraded natural pearls temporarily strung for convenience of transport (excl. mother of pearl)
7101.2100	Cultured pearls, unworked, whether or not graded
7101.2200	Cultured pearls, worked, whether or not graded, but not strung, mounted or set, ungraded natural pearls temporarily strung for convenience of transport
7102.3100	Diamonds, unworked or simply sawn, cleaved or bruted (excl. industrial diamonds)
7102.3900	Diamonds, worked, but not mounted or set (excl. industrial diamonds)
7103.1000	Precious and semi-precious stones, unworked or simply sawn or roughly shaped, whether or not graded (excl. diamonds and imitation precious and semi-precious stones)
7103.9100	Rubies, sapphires and emeralds, worked, whether or not graded, but not strung, mounted or set, rubies, sapphires and emeralds, ungraded, temporarily strung for convenience of transport (excl. rubies, sapphires and emeralds, simply sawn or roughly shaped, imitation precious and semi-precious stones)
7103.9900	Precious and semi-precious stones, worked, whether or not graded, but not strung, mounted or set, precious and semi-precious stones, worked, ungraded, temporarily strung for convenience of transport (excl. precious and semi-precious stones, simply sawn or roughly shaped, rubies, sapphires and emeralds, imitation precious and semi-precious stones)
7116.1000	Articles of natural or cultured pearls, not elsewhere specified
7116.2011	Necklaces, bracelets and other articles, wholly of natural precious or semi-precious stones, simply strung without fastener or other accessories
7116.2019	Articles made wholly of precious and semi-precious stones (excl. 7116.2011)
7116.2090	Articles made of precious and semi-precious stones, natural, synthetic or reconstructed (excl. 7116.2011 and 7116.2019)

APPENDIX 2 DETAILED IMPORT STATISTICS

Table 2.1 Imports of natural pearls into the EU, 1998-2000 (HS code 7101.1000)
US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	10,995	79	13,860	13,075	22	16,157	17,562	28
Extra-EU	9,178	74	9,875	9,316	15	13,484	14,656	28
Developing countries	1,073	1	1,374	1,296	1	690	750	9
United Kingdom	4,044	2	6,017	5,676	1	9,054	9,841	2
France	586	0	596	562	7	1,820	1,978	0
Spain	1,707	9	1,331	1,256	12	1,298	1,411	23
Ireland	35	2	2,404	2,268	0	979	1,064	0
Belgium & Luxembourg	547	0	409	386	0	864	939	0
Italy	3,070	63	1,555	1,467	2	639	695	3
Austria	551	0	801	756	0	517	562	0
Sweden	83	0	138	130	0	254	276	0
Denmark	63	3	63	59	0	207	225	0
Portugal	166	0	258	243	0	163	177	0
Greece	13	0	96	91	0	160	174	0
Germany	30	0	80	75	0	109	119	0
Finland	84	0	69	65	0	53	58	0
The Netherlands	17	0	46	43	0	40	43	0

Source: Eurostat 2000

Table 2.2 Imports of cultured pearls, unworked into the EU, 1998-2000 (HS code 7101.2100)
US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	37,408	8	33,265	31,382	23	37,254	40,493	9
Extra-EU	34,853	3	31,395	29,618	22	33,770	36,706	9
Developing countries	1,522	1	1,836	1,732	19	2,305	2,505	2
France	9,661	1	9,413	8,880	16	11,054	12,015	0
Germany	7,678	1	8,644	8,155	2	8,622	9,372	2
United Kingdom	12,058	3	7,739	7,301	1	6,576	7,148	0
Spain	1,711	2	1,667	1,573	4	4,976	5,409	1
Italy	1,317	1	1,307	1,233	0	2,353	2,558	5
Belgium & Luxembourg	1,976	0	2,082	1,964	0	1,678	1,823	0
Austria	1,830	0	957	903	0	934	1,015	0
The Netherlands	292	0	497	469	0	305	332	1
Sweden	243	0	477	450	0	254	276	0
Finland	198	0	190	179	0	221	240	0
Denmark	174	0	165	156	0	161	175	0
Portugal	137	0	109	103	0	114	124	0
Ireland	4	0	2	2	0	6	6	0
Greece	128	0	17	16	0	0	0	0

Source: Eurostat 2000

Table 2.4 Imports of cultured pearls, worked into the EU, 1998-2000 (HS code 7101.2200)
US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value EUR	volume	value US\$	value EUR	volume
Total	219,444	100	236,181	222,812	84	196,014	213,059	54
Extra-EU	201,242	44	216,480	204,226	76	182,057	197,888	51
Developing countries	14,999	10	18,600	17,547	29	18,857	20,497	17
Germany	92,354	7	85,929	81,065	10	65,011	70,664	14
Italy	50,742	12	61,034	57,579	15	47,618	51,759	14
United Kingdom	21,417	42	28,765	27,137	1	33,894	36,841	4
France	20,605	7	19,895	18,769	23	20,272	22,035	2
Spain	12,873	2	17,168	16,196	8	12,486	13,572	14
Austria	10,786	0	12,706	11,987	0	8,506	9,246	1
The Netherlands	1,990	0	3,281	3,095	1	2,583	2,808	0
Belgium & Luxembourg	3,926	0	2,891	2,727	3	2,071	2,251	0
Denmark	1,484	0	1,789	1,688	20	1,164	1,265	1
Sweden	1,406	0	1,231	1,161	1	1,053	1,145	0
Portugal	605	0	942	889	0	854	928	0
Greece	655	0	331	312	2	305	331	4
Finland	296	0	202	191	0	155	168	0
Ireland	304	30	18	17	0	42	46	0

Source: Eurostat 2000

Table 2.5 Imports of diamonds, unworked into the EU, 1998-2000 (HS code 7102.3100)
US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	8,816,808	33	12,398,706	11,696,892	44	13,269,388	14,423,248	37
Extra-EU	6,399,555	26	9,170,774	8,651,674	37	10,093,650	10,971,359	31
Developing countries	2,055,725	3	3,218,209	3,036,046	9	4,400,044	4,782,656	8
Belgium & Luxembourg	5,292,185	20	6,813,316	6,427,657	25	7,271,150	7,903,424	21
United Kingdom	3,477,092	13	5,549,999	5,235,848	19	5,967,100	6,485,978	16
Portugal	45,242	0	31,165	29,401	0	26,808	29,139	0
Ireland	431	0	1,604	1,513	0	1,396	1,517	0
Italy	28	0	737	695	0	953	1,036	0
France	272	0	517	488	0	898	976	0
Germany	390	0	767	724	0	527	573	0
The Netherlands	272	0	21	20	0	280	304	0
Austria	595	0	315	297	0	174	189	0
Finland	7	0	88	83	0	68	74	0
Greece	292	0	99	93	0	17	19	0
Spain	1	0	66	62	0	13	14	0
Sweden	1	0	12	11	0	5	5	0
Denmark	0	0	0	0	0	1	1	0

Source: Eurostat 2000

Table 2.6 Imports of diamonds, worked into the EU, 1998-2000 (HS code 7102.3900)
US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	5,762,316	19	5,901,741	5,567,680	30	7,011,458	7,621,150	182
Extra-EU	4,392,210	1	4,490,279	4,236,112	1	5,548,613	6,031,101	1
Developing countries	1,593,706	1	1,682,940	1,587,679	1	1,888,279	2,052,477	1
Belgium & Luxembourg	4,177,719	1	4,140,990	3,906,594	1	5,102,628	5,546,335	1
United Kingdom	617,279	1	817,297	771,035	16	786,444	854,830	0
France	257,629	0	211,719	199,735	0	374,358	406,911	0
Italy	324,405	2	350,898	331,036	1	357,822	388,937	2
Germany	283,736	0	260,702	245,945	0	256,065	278,332	0
Spain	38,185	11	38,419	36,244	1	47,696	51,844	18
The Netherlands	25,804	1	32,159	30,339	6	40,032	43,513	12
Portugal	6,572	0	19,024	17,947	0	18,961	20,610	0
Austria	7,923	1	6,985	6,590	0	6,571	7,142	0
Denmark	8,241	0	9,321	8,793	0	5,918	6,433	0
Sweden	4,113	0	4,007	3,780	0	4,527	4,921	0
Finland	4,512	0	3,976	3,751	0	3,853	4,188	0
Ireland	1,943	2	3,251	3,067	3	3,464	3,765	4
Greece	4,255	0	2,995	2,825	2	3,116	3,387	145

Source: Eurostat 2000

Table 2.7 Imports of precious and semi-precious stones, unworked into the EU, 1998-2000
(HS code 7103.1000) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	42,461	2,548	37,516	35,392	2,775	38,026	41,333	2,554
Extra-EU	39,548	2,461	33,123	31,248	2,586	33,672	36,600	2,484
Developing countries	28,625	2,126	25,923	24,456	2,320	27,510	29,902	2,181
Germany	25,300	1,743	21,585	20,363	1,866	21,916	23,822	1,926
Austria	5,855	146	4,904	4,626	116	5,188	5,639	71
Italy	3,507	306	3,624	3,419	299	2,808	3,052	230
Belgium & Luxembourg	1,663	13	1,601	1,520	13	2,665	2,897	18
France	1,313	81	1,744	1,645	87	1,555	1,690	64
Ireland	137	0	1,042	983	1	1,254	1,363	1
United Kingdom	3,573	102	1,646	1,553	191	769	836	80
Spain	269	45	528	498	103	756	822	72
Denmark	180	6	366	345	29	366	398	12
The Netherlands	311	63	252	238	45	328	357	48
Greece	85	28	56	53	6	307	334	19
Sweden	148	13	93	88	5	66	72	3
Portugal	83	2	41	39	12	30	33	10
Finland	41	0	24	23	2	17	19	0

Source: Eurostat 2000

Table 2.8 Imports of rubies, sapphires and emeralds, worked into the EU, 1998-2000
(HS code 7103.9100) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	229,421	7	233,552	220,332	22	238,046	258,746	3
Extra-EU	210,248	6	212,790	200,745	2	214,237	232,866	1
Developing countries	101,145	1	104,399	98,490	2	90,588	98,465	1
France	66,596	0	74,017	69,827	1	98,269	106,814	1
Belgium & Luxembourg	42,564	0	55,537	52,393	0	39,465	42,987	0
Italy	24,184	0	28,676	27,053	0	36,299	39,455	0
United Kingdom	52,706	5	38,099	35,942	17	28,252	30,709	2
Germany	33,405	0	28,332	26,728	0	24,458	26,585	0
Austria	3,459	0	3,469	3,273	0	6,499	7,064	0
Spain	3,802	0	2,882	2,719	0	2,542	2,763	0
Portugal	545	0	318	300	0	963	1,047	0
The Netherlands	644	0	1,045	986	2	467	508	0
Sweden	367	1	295	278	0	306	333	0
Ireland	214	1	161	152	2	200	217	0
Finland	143	0	167	158	0	141	153	0
Denmark	221	0	242	228	0	137	149	0
Greece	571	0	315	297	0	50	54	0

Source: Eurostat 2000

Table 2.9 Imports of precious and semi-precious stones, worked into the EU, 1998-2000
(HS code 7103.9900) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	90,360	1,096	92,278	87,055	1,098	94,796	103,039	1,333
Extra-EU	66,223	1,045	69,073	65,163	1,082	72,599	78,912	1,313
Developing countries	38,737	949	40,445	38,156	997	46,898	50,976	1,227
Germany	29,052	651	25,389	23,952	674	26,085	28,353	840
Italy	20,950	90	19,528	18,423	71	24,410	26,533	109
United kingdom	20,105	132	20,804	19,626	128	20,149	21,901	167
France	6,479	21	7,787	7,346	37	9,510	10,337	29
Spain	3,121	101	3,443	3,248	77	4,732	5,144	129
Austria	3,637	6	2,784	2,626	22	3,099	3,369	13
Sweden	2,424	29	2,484	2,343	0	2,575	2,799	4
Belgium & Luxembourg	1,091	15	5,395	5,090	3	1,734	1,885	0
Portugal	722	9	2,476	2,336	6	833	905	3
The Netherlands	1,318	33	718	677	77	463	503	31
Greece	601	4	530	500	3	455	495	7
Denmark	156	0	292	275	0	358	389	1
Finland	375	1	467	441	0	216	235	0
Ireland	329	4	186	175	0	176	191	0

Source: Eurostat 2000

Table 2.10 Imports of articles of natural or cultured pearls into the EU, 1998-2000
(HS code 7116.1000) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	37,220	57	31,198	29,432	25	32,682	35,524	82
Extra-EU	32,001	52	26,602	25,096	23	26,625	28,940	70
Developing countries	5,966	32	5,634	5,315	14	7,315	7,951	44
Germany	8,658	6	7,467	7,044	7	11,112	12,078	15
Spain	9,186	1	7,536	7,109	1	4,729	5,140	10
United Kingdom	5,044	5	5,360	5,057	0	4,417	4,801	2
France	4,892	8	4,092	3,860	7	4,051	4,403	6
Italy	3,163	9	2,180	2,057	8	2,554	2,776	18
Belgium & Luxembourg	177	1	415	391	1	1,887	2,051	16
Austria	2,491	0	1,622	1,530	0	1,482	1,611	7
Denmark	1.1101	0	808	762	0	748	813	0
The Netherlands	251	0	401	378	1	589	640	8
Portugal	920	3	530	500	0	491	534	0
Greece	226	3	172	162	0	271	295	0
Sweden	816	19	328	309	0	160	174	0
Finland	149	0	127	120	0	98	106	0
Ireland	148	2	163	154	0	93	101	0

Source: Eurostat 2000

Table 2.11 Imports of necklaces, bracelets and other articles into the EU, 1998-2000
(HS code 7116.2011) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	13,600	114	12,160	11,472	88	23,945	26,027	276
Extra-EU	8,726	99	8,098	7,640	87	19,049	20,705	272
Developing countries	4,619	80	5,271	4,973	71	11,081	12,045	185
Germany	3,333	23	4,103	3,871	32	10,733	11,666	143
Italy	3,161	35	2,930	2,764	29	2,763	3,003	41
Spain	999	21	685	646	11	2,602	2,828	47
Austria	961	1	1,084	1,023	3	2,306	2,507	16
United Kingdom	1,504	7	671	633	1	1,893	2,058	12
France	993	6	653	616	4	1,030	1,120	8
Ireland	280	0	560	528	0	835	908	0
Denmark	731	12	391	369	0	627	682	1
Portugal	1,058	7	134	126	6	358	389	2
Greece	315	2	149	141	2	328	357	3
The Netherlands	82	0	50	47	0	184	200	1
Belgium & Luxembourg	44	0	665	628	0	157	170	2
Sweden	122	0	59	56	0	94	102	0
Finland	18	0	24	23	0	35	38	0

Source: Eurostat 2000

Table 2.12 Imports of articles made wholly of precious and semi-precious stones into the EU, excluding 7116.2011, 1998-2000, (HS code 7116.2019) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	19,990	614	23,328	22,008	672	30,808	33,487	975
Extra-EU	16,675	601	17,043	16,078	665	25,110	27,294	963
Developing countries	12,619	563	13,104	12,362	616	18,598	20,215	865
Germany	5,641	187	5,796	5,468	240	13,391	14,555	453
France	5,991	157	5,508	5,196	82	5,245	5,701	77
Italy	2,203	66	2,601	2,454	111	3,948	4,291	112
Spain	1,644	96	2,124	2,004	137	2,874	3,124	196
United Kingdom	1,145	35	2,690	2,538	24	2,166	2,354	36
Austria	856	4	1,087	1,025	20	967	1,051	8
Greece	579	36	535	505	21	445	484	51
The Netherlands	328	4	509	480	14	438	476	22
Ireland	327	1	502	474	0	416	452	0
Belgium & Luxembourg	716	15	1,423	1,342	9	620	674	5
Portugal	292	6	278	262	9	213	232	15
Sweden	137	2	88	83	2	47	51	0
Denmark	95	2	128	121	0	26	28	0
Finland	36	3	60	57	3	15	16	0

Source: Eurostat 2000

Table 2.13 Imports of articles made of precious and semi-precious stones, natural, synthetic or reconstructed, into the EU, excluding 7116.2011 and 7116.2019, 1998-2000, (HS code 7116.2090) US\$ 1,000 / € 1,000 / tons

	1998		1999			2000		
	Value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	42,130	446	29,360	27,698	411	30,288	32,922	856
Extra-EU	26,796	380	20,649	19,480	399	23,035	25,038	847
Developing countries	9,862	361	11,573	10,918	344	14,514	15,776	772
Germany	5,775	135	5,770	5,443	167	8,894	9,667	514
France	6,148	46	7,227	6,818	36	7,038	7,650	41
United Kingdom	16,868	112	4,153	3,918	72	3,583	3,895	117
Italy	4,528	48	3,631	3,425	70	3,065	3,331	89
Ireland	3,580	2	2,633	2,484	2	2,619	2,847	0
Spain	2,480	66	2,019	1,905	15	2,314	2,515	44
Belgium & Luxembourg	1,365	20	1,749	1,650	16	1,191	1,295	7
Austria	734	3	732	691	4	834	907	8
Greece	28	0	319	301	13	315	342	14
The Netherlands	156	0	377	356	2	132	144	7
Sweden	109	1	269	254	3	91	99	0
Denmark	121	2	284	268	3	89	97	1
Portugal	171	11	123	116	7	73	79	6
Finland	71	0	73	69	1	50	54	8

Source: Eurostat 2000

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL

International Standardisation Institute (ISO)

Address: P.O. Box 56,
CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 7490111
Fax: + 41 (0) 22 7333430
E-mail: central@iso.ch
Internet: www.iso.ch

EUROPEAN UNION

Comité Européen de Normalisation (CEN)

European Normalisation Committee

Address: Third countries Unit, Rue de Stassart 36,
B-1050 Brussels, Belgium
Telephone: + 32 (0) 2 5500811
Fax: + 32 (0) 2 5500819
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.

Address: P.O. Box 200,
3200 AE Spijkenisse, The Netherlands
Telephone: + 31 (0) 181-693750
Fax: + 31 (0) 181-693582

FRANCE

Association Française de Normalisation (AFNOR)

Address: Tour Europe,
92049 Paris La Défense Cedex, France
Telephone: + 33 (0) 1 42915555
Fax: + 33 (0) 1 42915656
Internet: www.afnor.fr

GERMANY

Deutsches Institut für Normung eV (DIN)

Address: Burggrafenstrasse 4-10,
10772 Berlin, Germany
Telephone: + 49 (0) 30 2601 0
Fax: + 49 (0) 30 2601 1231
E-mail: postmaster@din.de
Internet: www.din.de

RAL Deutsches Institut für Gütesicherung und Kennzeichnung e.V.

Address: Siegburger Straße 39,
53757 Sankt Augustin, Germany
Telephone: 02241/1605-0
Fax: 02241/1605-11
E-mail: RAL-Institut@t-online.de
Internet: www.ral.de

ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Address: Via Battinotti Stassi 11A,
20100 Milan, Italy
Telephone: + 39 02 700241
Fax: + 39 02 70106106
E-mail: uni@uni.com
Internet: www.unicei.it

THE NETHERLANDS

Nederlands Normalisatie Instituut (NNI)

Netherlands Standardisation Institute

Address: P.O.Box 5059,
2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15 2690390
Fax: + 31 (0) 15 2690190
E-mail: info@nni.nl
Internet: www.nni.nl

UNITED KINGDOM

British Standards Institution (BSI)

Address: British Standards House,
389 Chiswick High Road,
London W4 4AL, United Kingdom
Telephone: + 44 (0) 208 996 90 00
Fax: + 44 (0) 208 996 74 00
E-mail: info@bsi.org.uk
Internet: www.bsi.org.uk

BM TRADA Certification Limited

Address: Hughenden Valley, High Wycombe,
Bucks HP14 4NR. United Kingdom
Telephone: + 44 (0) 1494 569700
Fax: + 44 (0) 1494 565487
E-mail: enquiries@bmtrada.com
Internet: www.bmtrada.com

APPENDIX 4 SOURCES OF PRICE INFORMATION

Hoge Raad voor de Diamant (Diamond High Council)

Address: Hoveniersstraat 22,
2018 Antwerp

Telephone: + 32 (0) 3 222 05 11

Fax: + 32 (0) 3 222 07 24

E-mail: info@hrd.be

Internet: www.diamonds.be

Publishes: Antwerp Diamond Index

APPENDIX 5 TRADE ASSOCIATIONS

THE NETHERLANDS

The Gold and Silver Federation

The Netherlands Association of Gold and Silversmiths

Address: P.O. Box 904,
2270 AX Voorburg
Telephone: + 31 (0) 70 386 77 77
Fax: + 31 (0) 70 38 10 47
E-mail: federatieo@fgz.nl
Internet: www.federatiegoudzilver.nl

BELGIUM

The Diamond High Council

(Hoge Raad voor Diamant)

Address: Hoveniersstraat 22,
2018 Antwerp
Telephone: + 32 (0) 3 222 05 11
Fax: + 32 (0) 3 222 07 24
E-mail: info@hrdcan.be
Internet: www.diamonds.be

FRANCE

Conseil Interfederal de la Bijouterie, Horlogerie, Joallerie, Orfeverrie

Address: 58, Rue de Louvre,
F-75002 Paris
Telephone: + 33 (0) 1 402 628 45
Fax: + 33 (0) 1 508 56 47
E-mail: info@bijouformation.com
Internet: www.bijouformation.com

GERMANY

Vereinigung der Bundesverbände des Deutschen Schmuck und Silberwarengewerbes

Address: Industriehaus, Poststrasse 1,
D-75172 Pforzheim
Telephone: + 49 (0) 7231 33 041
Fax: + 49 (0) 7231 35 58 87
E-mail: info@bv-schmuck-uhren.de
Internet: www.bv-schmuck-uhren.de

Bundesverband der Edelstein und Diamantindustrie e.V.

Address: P.O.Box 122220,
D-55714 Idar-Oberstein
Telephone: + 49 (0) 6781 94 42 40
Fax: + 49 (0) 6781 94 42 66
E-mail: info@bv-edelsteine-diamanten.de
Internet: www.bv-edelsteine-diamanten.de

UNITED KINGDOM

British Jewellery and Giftware Federation

Address: 10 Vyse Street, Hockley,
Birmingham B18 6LT
Telephone: + 44 (0) 121 236 26 57
Fax: + 44 (0) 121 236 39 21
E-mail: info@bjgf.org.uk
Internet: www.bjgf.org.uk

The Gemmological Association and Gem Testing Laboratory of Great Britain

Address: 27 Greville Street,
London EC1N 8TN
Telephone: + 44 (0) 207 404 33 34
Fax: + 44 (0) 207 404 88 43
E-mail: gagtl@btinternet.com
Internet: www.gagtl.ac.uk

GEM TESTING LABORATORIES

The Diamond High Council (HRD) / Certificates Department

Address: Hoveniersstraat 22,
2018 Antwerp, Belgium
Telephone: + 32 (0) 3 222 07 01
Fax: + 32 (0) 3 222 07 04
E-mail: gem_lab@hrd.be

The Gem Testing Laboratory

Address: 27, Greville Street,
London EC1N 8TN, United Kingdom
Telephone: + 44 (0) 20 7405 3351
Fax: + 44 (0) 20 7831 9479
E-mail: gagtl@btinternet.com

APPENDIX 6 TRADE FAIR ORGANISERS

GERMANY

Inhorgenta

Frequency: Annual
Address: Messe München GmbH, Messegelände,
D-81823 Munich, Germany
Telephone: + 49 (0) 89 949-01
Fax: + 49 (0) 89 949-09
E-mail: info@inhorgenta.de
Internet: www.inhorgenta.de
Jewellery, precious stones, pearls

Intergem

Frequency: Annual
Address: Budau Messehallen, Mainzerstrasse 34,
D-55743 Idar-Oberstein
Telephone: + 49 (0) 6781 41 015
Fax: + 49 (0) 6781 42 418
E-mail: office@intergem-messe.de
Internet: www.intergem-messe.de
Jewellery, loose stones

Mineralientage München

Frequency: Annual
Address: PO box 60,
D-82032 Oberhaching
Telephone: + 49 (0) 89 613 711
Fax: + 49 (0) 89 613 54 00
E-mail: mineralientage@mineralogie.de
Internet: www.mineralogie.de/mineralientage
All minerals, loose stones, jewellery

FRANCE

International Mineral & Fossil Show

Sainte-Marie-aux-Mines

Frequency: Annual
Address: 32, Rue de Baldersheim,
F-68110 Ilzach
Telephone: + 33 (0) 3 89 50 51 51
Fax: + 33 (0) 3 89 51 19 90
E-mail: michel.schwab@evhr.net
Internet: www.minerapole.com
Minerals, fossils and gems

THE NETHERLANDS

Nederlandse Lapidaristen Club

Frequency: Bi-annual
Address: NLC fair, Johanna Westerdijkplein 75,
2521 EN The Hague
Telephone: + 31 (0) 70 445 88 88
Fax: + 31 (0) 70 445 85 85
Internet: www.xs4all.nl/-lapida/

ITALY

VicenzaOro

Frequency: Annual
Address: Vicenza Trade Grounds, Via dell Oreficeria 16,
36100 Vicenza
Telephone: + 39 0444 969 111
Fax: + 39 0444 563 954
E-mail: info@vicenzafiera.it
Internet: www.vicenzafiera.it
Jewellery, loose stones

Bologna Mineral Show

Frequency: Annual
Address: 67 Via Guidotti,
I-40143 Bologna
Telephone: + 39 051 644 73 15
Fax: + 39 051 644 73 15
Loose stones, decorative stones, jewellery

UNITED KINGDOM

International Jewellery London

Frequency: Annual
Address: Reed Exhibitions, Oriol House,
26 The Quadrant, Richmond,
Surrey TW9 1DL
Telephone: + 44 (0) 20 8190 7910
Fax: + 44 (0) 20 8940 2171
E-mail: webmaster@www.reedexpo.com
Internet: www.jewellerylondon.com
Jewellery

APPENDIX 7 TRADE PRESS

THE NETHERLANDS

Edelmetaal

Address: P.O.Box 904,
2270 AX Voorburg, The Netherlands

Telephone: + 31 (0) 70 386 77 77

Fax: + 31 (0) 70 387 10 47

E-mail: edelmetaal@fgz.nl

Internet: www.federatiegoudzilver.nl

Publishes "Edelmetaal" on a weekly basis

UNITED KINGDOM

The Gemmological Association and Gem Testing

Laboratory of Great Britain

Address: 27, Greville Street,
London EC1N 8TN, United Kingdom

Telephone: + 44 (0) 207 404 33 34

Fax: + 44 (0) 207 404 88 43

E-mail: gagtl@tinternet.com

Internet: www.gagtl.ac.uk

Publishes "The Journal of Gemmology" on a weekly basis

GERMANY

Christian Weise Verlag GmbH

Address: Orleansstrasse 69,
D-81667 Muenchen, Germany

Telephone: + 49 (0) 89 480 29 33

Fax: + 49 (0) 89 688 61 60

E-mail: lapis.mineralienmagazin@t-online.de

Internet: www.lapis.de

Publishes "Lapis Mineralien Magazin" eleven times per year

Bode Verlag

Address: Oerter Putt 28,
D-45721 Haltern, Germany

Telephone: + 49 (0) 2364 161 07

Fax: + 49 (0) 2364 169 273

E-mail: info@bodeverlag.de

Internet: www.bode-verlag.de

Publishes "Mineralien Welt" six times per year

BELGIUM

The Diamond High Council (Hoge Raad voor Diamant)

Address: Hoveniersstraat 22,
2018 Antwerp

Telephone: + 32 (0) 3 222 05 11

Fax: + 32 (0) 3 222 07 24

E-mail: info@hrdcan.be

Internet: www.diamonds.be

Publishes "Kompas Diamonds Belgium", a list of names and addresses of the Belgian diamond sector and its services and many other publications

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL

International Trade Centre UNCTAD/WTO (ITC)

Address: Palais des Nations,
P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: (41) 22-7300111
Fax: (41) 22-7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA

Austrian Federal Economic Chamber

Address: P.O. Box 150,
A-1045 Vienna, Austria
Telephone: + 43 (0) 1 501050
Fax: + 43 (0) 1 50105-150
E-mail: aw-online@aw.wk.or.at
Internet: www.wk.or.at/aw/aw_intl/index.htm

DENMARK

Danish Import Promotion Office for Products from Developing Countries (DIPO)

Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen, Denmark
Telephone: + 45 (0) 33 950541
Fax: + 45 (0) 33 120525
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

Germany

BfAI, Federal Office of Foreign Trade Information

Address: Agrippastrasse 87-93,
P. O. Box 100522,
50455 Cologne, Germany
Telephone: + 49 (0) 221 2057-0
Fax: + 49 (0) 221 2057-212
E-mail: bus.contacts@bfai.com
Internet: www.bfai.com

ITALY

ICE

Italian National Institute for Foreign Trade

Address: Via Liszt 21,
00144 Rome, Italy
Telephone: + 39 06 59921
Fax: + 39 0659926900
E-mail: ice@ice.it
Internet: www.ice.it

THE NETHERLANDS

CBI, Centre for the Promotion of Imports from developing countries

Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY

Norwegian Agency for Development Co-operation (Norad)

Address: Tolbugaten 31, P.O. Box 8034 Deo,
Oslo, Norway
Telephone: + 41 (0) 22 242030
Fax: + 41 (0) 22 242031
Internet: www.norad.no

SWEDEN

Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation (SIDA)

Address: Sveavägen 20,
S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Fax: + 46 (0) 8 6208864
E-mail: sida@sida.org.se
Internet: www.sida.se

SWITZERLAND

SIPPO, Swiss Import Promotion Programme

Address: Avenue de l'Avant-Poste 4,
CH-1001 Lausanne, Switzerland
Telephone: + 41 (0) 21 320 32 31
Fax: + 41 (0) 21 320 73 37
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

International Chamber of Commerce

Address: 38, Cours Albert 1er,
75008 Paris, France
Telephone: + 33 (0) 1 49 53 28 28
Fax: + 33 (0) 1 49 53 29 42
E-mail: icc@iccwbo.org
Internet: www.iccwbo.org

UNCTAD

(United Nations Conference on Trade and Development)

Address: Palais des Nations,
CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 90712 34
Fax: + 41 (0) 22 9070043
E-mail: ers@unctad.org
Internet: www.unctad.org

ITC

(International Trade Centre)

Address: Palais des Nations,
CH-1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 73 00 111
Fax: + 41 (0) 22 733 44 39
E-mail: itcreg@intracen.org
Internet: www.intracen.org

EUROPE

ABC of Trade and Industry

(Trade directories for all major EU countries)

Address: P.O.Box 190,
2000 AD Haarlem, The Netherlands
Telephone: + 31 (0) 23 531 90 31
Fax: + 31 (0) 23 532 70 33
E-mail: info@abc-d.nl
Internet: www.abc-d.nl

Europages

Address: 47 Rue Louis Blanc,
92984 Paris La Defense Cedex, France
Telephone: + 33 (0) 1 411 649 00
Fax: + 33 (0) 1 411 649 50
E-mail: comments@europages.com
Internet: www.europages.com

THE NETHERLANDS

CBI/Accessguide

(CBI's database on European non-tariff trade barriers)

Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
Email: cbi@accessguide.nl
Internet: www.cbi.nl/accessguide

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea)

Afghanistan	Guatemala	Pakistan
Albania	Guinea	Palau Islands
Algeria	Guinea-Bissau	Palestinian Admin. Areas
Angola	Guyana	Panama
Anguilla	Haiti	Papua New Guinea
Antigua and Barbuda	Honduras	Paraguay
Argentina	India	Peru
Armenia	Indonesia	Philippines
Aruba	Iran	Rwanda
Azerbaijan	Iraq	São Tomé & Príncipe
Bahrain	Jamaica	Saudi Arabia
Bangladesh	Jordan	Senegal
Barbados	Kazakhstan	Seychelles
Belize	Kenya	Sierra Leone
Benin	Kiribati	Slovenia
Bhutan	Korea, Rep. of	Solomon Islands
Bolivia	Korea, South	Somalia
Bosnia & Herzegovina	Kyrgyz Rep.	South Africa
Botswana	Laos	Sri Lanka
Brazil	Lebanon	St. Helena
Burkina Faso	Lesotho	St. Kitts-Nevis
Burundi	Liberia	St. Lucia
Cambodia	Libya	St. Vincent and Grenadines
Cameroon	Macao	Sudan
Cape Verde	Macedonia	Surinam
Central African rep.	Madagascar	Swaziland
Chad	Malawi	Syria
Chile	Malaysia	Tajikistan
China	Maldives	Tanzania
Colombia	Mali	Thailand
Comoros	Malta	Timor
Congo	Marshall Islands	Togo
Cook Islands	Mauritania	Tokelau
Costa Rica	Mauritius	Tonga
Côte d'Ivoire	Mayotte	Trinidad & Tobago
Croatia	Mexico	Tunisia
Cuba	Micronesia, Fed. States	Turkey
Djibouti	Moldova	Turkmenistan
Dominica	Mongolia	Turks & Caicos Islands
Dominican republic	Montserrat	Tuvalu
Ecuador	Morocco	Uganda
Egypt	Mozambique	Uruguay
El Salvador	Myanmar	Uzbekistan
Equatorial Guinea	Namibia	Vanuatu
Eritrea	Nauru	Venezuela
Ethiopia	Nepal	Vietnam
Fiji	Netherlands Antilles	Virgin Islands (UK)
French Polynesia	New Caledonia	Wallis & Futuna
Gabon	Nicaragua	Western Samoa
Gambia	Niger	Yemen
Georgia	Nigeria	Yugoslavia, Fed. Rep.
Ghana	Niue	Zaire
Gibraltar	Northern Marianas	Zambia
Grenada	Oman	Zimbabwe

Note: Eurostat figures do not include figures for Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

Countries falling under the groups mentioned in Section 1.2 of the EU Strategic Marketing Guide “Precious and semi-precious stones”.

LDC, Andes group and Central American Common Market

Afghanistan, Angola, Bangladesh, Burkina Faso, Burundi, Benin, Bhutan, Congo, Central African Republic, Cape Verde, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Equatorial Guinea, Guinea-Bissau, Haiti, Cambodia, Kiribati, Comoros (excl. Mayotte), Laos, Liberia, Lesotho, Madagascar, Mali, Myanmar, Mauritania, Maldives, Malawi, Mozambique, Niger, Nepal, Rwanda, Salomon Islands, Sudan, Sierra Leone, Somalia, Sao Tomé & Príncipe, Chad, Togo, Tuvalu, Tanzania, Uganda, Vanuatu, Samoa, Yemen, Zambia.

SPGE

Bolivia, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Peru, El Salvador, Venezuela

SPGI

United Arab Emirates, Antigua and Barbuda, Anguilla, Armenia, Netherlands Antilles, Antarctica, Argentina, American-Samoa, Aruba, Azerbaijan, Barbados, Bahrain, Bermuda, Brunei, Brazil, Bahamas, Bouvet Island, Botswana, Belarus, Belize, Cocos Islands, Congo (Republic), Ivory Coast, Cook Islands, Chile, Cameroon, China, Cuba, Christmas Island, Cyprus, Dominica, Dominican Republic, Algeria, Egypt, Fiji, Falkland Islands, Micronesia, Gabon, Grenada, Georgia, Ghana, Gibraltar, Greenland, South Georgia and the South Sandwich Islands, Guam, Guyana, Heard and McDonald Islands, Indonesia, India, British Oceania, Iraq, Iran, Jamaica, Jordan, Kenya, Kyrgyz Republic, St. Kitts-Nevis, Kuwait, Cayman Islands, Kazakhstan, Lebanon, St. Lucia, Sri Lanka, Libya, Morocco, Moldavia, Marshall Islands, Mongolia, Macao, Montserrat, Mauritius, Mexico, Malaysia, Namibia, New Caledonia, Norfolk, Nigeria, Nauru, Niue Island, Oman, French Polynesia, Papua-New-Guinea, Philippines, Pakistan, St Pierre and Miquelon, Pitcairn, Palau, Paraguay, Qatar, Russia, Saudi-Arabia, Seychelles, St Helena, Senegal, Surinam, Syria, Swaziland, Turks & Caicos Islands, French Southern Areas, Thailand, Tajikistan, Tokelau Islands, Turkmenistan, Tunisia, Tonga, Trinidad and Tobago, Ukraine, Uruguay, Uzbekistan, St Vincent (VC), British Virgin Islands, Virgin Islands (USA), Vietnam (VN), Wallis and Futuna Islands, Republic of South Africa, Zimbabwe

APPENDIX 11 IMPORTERS AND WHOLESALERS IN EU COUNTRIES

THE NETHERLANDS

11.1 Diamonds

Amsterdamse Diamant Maatschappij BV

Address: Hogehilweg 14V,
1101 CD Amsterdam
Telephone: + 31 (0) 20 691 55 01
Fax: + 31 (0) 20 691 55 46
E-mail: passcher@cs.com

Leo Blik C.V.

Address: Meindert Hobbemastraat 9,
2101 BH Heemstede
Telephone: + 31 (0) 23 529 83 20
Fax: + 31 (0) 23 529 83 19
E-mail: blik.diamonds@inter.nl.net

Blog Diamonds

Address: Hogehilweg 14V,
1101 CD Amsterdam
Telephone: + 31 (0) 20 691 24 41
Fax: + 31 (0) 20 691 39 46
E-mail: blog.diamonds@tiscali.nl
Internet: www.blogdiamonds.nl

Coster Diamonds

Address: Paulus Potterstraat 2-4,
1071 CZ Amsterdam
Telephone: + 31 (0) 20 305 55 55
Fax: + 31 (0) 20 305 55 56

Diamanthandel L. Bohne B.V.

Address: Hogehilweg 14V,
1101 CD Amsterdam
Telephone: + 31 (0) 20 696 52 95
Fax: + 31 (0) 20 609 71 60
E-mail: lbohne@wxs.nl

Gassan Diamonds BV

Address: Nieuwe Uilenburgerstraat 173 – 175,
1011 LN Amsterdam
Telephone: + 31 (0) 20 622 53 33
Fax: + 31 (0) 20 624 60 84
E-mail: gassandiamonds@wxs.nl
Internet: www.amsterdam-city-of-diamonds.nl

Goldstoff Holland B.V.

Address: Hogehilweg 14V,
1101CD Amsterdam
Telephone: + 31 (0) 20 691 91 11
Fax: + 31 (0) 20 691 58 01
E-mail: j.goldstoff@planet.nl

Koninklijke Asscher Diamant Maatschappij BV

Address: P.O. Box 75059,
1070 AB Amsterdam
Telephone: + 31 (0) 20 679 13 11
Fax: + 31 (0) 20 679 22 37
E-mail: royal@asscher.nl
Internet: www.royalasscher.nl

Shalom Serri B.V.

Address: Hogehilweg 14V,
1101CD Amsterdam
Telephone: + 31 (0) 20 691 53 31
Fax: + 31 (0) 20 691 29 51

Theeboom Diamonds

Address: Hogehilweg 14V,
1101CD Amsterdam
Telephone: + 31 (0) 20 696 22 51
Fax: + 31 (0) 20 696 51 71
E-mail: jtheeboom@planet.nl

11.2 Precious and semi-precious stones, other than diamonds

Brazilian Curiosa Importeurs B.V.

Address: Stadhouderslaan 25-b,
3761 EJ Soest
Telephone: + 31 (0) 35 601 45 55
Fax: + 31 (0) 35 602 46 35
E-mail: brcu@worldonline.nl
Internet: www.brazilian-curiosa.com

A.J. Breebaart BV

Address: P.O.Box 1597,
3000 BN Rotterdam
Telephone: + 31 (0) 10 240 05 59
Fax: + 31 (0) 10 233 20 01
E-mail: breebaart@pi.net

Bijou Moderne BV

Address: Edisonlaan 36-38,
2665 JC Bleiswijk
Telephone: + 31 (0) 10 529 66 00
Fax: + 31 (0) 10 529 00 88
E-mail: info@bijou-moderne.nl
Internet: www.bijou-moderne.nl

UNITED KINGDOM

De Beers Consolidated Mines Ltd.

Diamonds

Address: 17 Charterhouse Street,
London EC1N 6RA
Telephone: + 44 (0) 171 404 19 44
Fax: + 44 (0) 171 430 35 60

Central Selling Organisation (C.S.O.)

Diamonds

Address: 17 Charterhouse Street,
London EC1N 6RA
Telephone: + 44 (0) 171 404 44 44
Fax: + 44 (0) 171 405 70 20

Dianoor jewels Ltd.

Precious stones

Address: 178 New bond Street,
W1Y 9PD, London
Telephone: + 44 (0) 20 7493 2020
Fax: + 44 (0) 20 7493 0220

Euro Pearls

Pearls

Address: 20 Kirby Street,
London EC1 N 8TS
Telephone: + 44 (0) 20 7405 8104
Fax: + 44 (0) 20 7831 2231

F.H. Lambert Ltd

Precious and semi-precious stones

Address: Rembrandt House, King George Ave,
Watford, Hertfordshire WD1 7PW
Telephone: + 44 (0) 1923 22 94 44
Fax: + 44 (0) 1923 25 57 17

The Stirling Stone Group PLC

Precious and semi-precious stones

Address: Wallace house, Whitehouse Rd.
Stirling FK7 7TE
Telephone: + 44 (0) 1786 45 05 60
Fax: + 44 (0) 1786 45 05 17

GERMANY

Arthur Loh & Soehne

Precious and semi-precious stones and pearls

Address: Goethestrasse 55A,
55743 Idar-Oberstein
Telephone: + 49 (0) 6781 424 27
Fax: + 49 (0) 6781 472 17

Karl Koerner GmbH

Precious and semi-precious stones and pearls

Address: Ossietzkystrasse 4,
70174 Stuttgart
Telephone: + 49 (0) 711 22 81 40
Fax: + 49 (0) 711 22 81 450

Klein & Becker

Precious and semi-precious stones and pearls

Address: Schillingstrasse 10,
55743 Idar-Oberstein
Telephone: + 49 (0) 6781 420 79
Fax: + 49 (0) 6781 418 70

Govind Jain

Precious and semi-precious stones and pearls

Address: Mainzerstrasse 57,
55743 Idar-oberstein
Telephone: + 49 (0) 6781 984 80
Fax: + 49 (0) 6781 417 27

C. Bansal

Precious and semi-precious stones and pearls

Address: Mainzer Strasse 34,
55743 Idar-Oberstein
Telephone: + 49 (0) 6781 474 31
Fax: + 49 (0) 6781 466 91

Joerg Schneider Edelstahlverarbeitung

Precious and semi-precious stones and pearls

Address: Ettenburgerstrasse 19,
99427 Weimar
Telephone: + 49 (0) 3643 41 98 97
Fax: + 49 (0) 3643 4198 98

Huhn Zuchtperlen

Precious and semi-precious stones and pearls

Address: Weiherstrasse 22-24,
75173 Pforzheim
Telephone: + 49 (0) 7231 222 00
Fax: + 49 (0) 7231 253 33

BELGIUM**Bijouterie Langohr-Mileur S.A.**

Precious and semi-precious stones

Address: Place Verte 12,
4800 Verviers
Telephone: + 32 (0) 87 33 55 30
Fax: + 32 (0) 87 33 55 35

Ferrara + Fils S.A.

Precious and semi-precious stones

Address: 32 Rue Gerard Wilket,
4672 Blegny
Telephone: + 32 (0) 43 87 58 25
Fax: + 32 (0) 43 87 58 79

Textimo NV

Precious and semi-precious stones and pearls

Address: Pelikaanstraat 92,
2018 Antwerp
Telephone: + 32 (0) 32 32 13 90
Fax: + 32 (0) 32 32 91 80

FRANCE**Arfan International SA**

Precious and semi-precious stones and pearls

Address: 35 Boulevard des Capucines,
75002 Paris
Telephone: + 33 (0) 1 42 61 66 74
Fax: + 33 (0) 1 42 20 96 66

Bijouterie Maurice Dubreuil-Evry

Precious and semi-precious stones

Address: Magasin 256, Centre Commercial Evry,
91000 Evry
Telephone: + 33 (0) 1 64 97 00 13
Fax: + 33 (0) 1 60 78 44 70

Gaston Poncet S.A.

Precious and semi-precious stones

Address: 6 Rue Auguste Lancon,
39200 St Claude
Telephone: + 33 (0) 384 45 02 81
Fax: + 33 (0) 384 45 18 95

ITALY**Heart of Gem di Cervari Alberto**

Precious and semi-precious stones

Address: 32 Via Alessandria,
15042 Bassignana (AL)
Telephone: + 39 0131 926 545
E-mail: alcervari@tin.it
Internet: www.alcervari.com

APPENDIX 12 DIAMOND EXCHANGES IN THE EU

The following Diamond Exchanges are members of the:

World Federation of Diamond Bourses

Address: Pelikaansstraat 62,
2018 Antwerp, Belgium
Telephone: + 32 (0) 3 232 76 55
Fax: + 32 (0) 3 226 40 73
E-mail: wfdb@iway.be
Internet: www.worldfed.com

BELGIUM

Antwerpsche Diamantkring C.V.

Address: Hoveniersstraat 2,
2018 Antwerp
Telephone: + 32 (0) 3 233 58 10
Fax: + 32 (0) 3 233 70 71

Beurs voor Diamanthehandel C.V.

Address: Pelikaansstraat 78,
2018 Antwerp
Telephone: + 32 (0) 3 233 53 13
Fax: + 32 (0) 3 233 65 03
E-mail: diamexch@iway.be

Diamantclub van Antwerpen C.V.B.A.

Address: Pelikaansstraat 62,
2018 Antwerp
Telephone: + 32 (0) 3 232 76 55
Fax: + 32 (0) 3 232 10 24
E-mail: diamantclub.van.antwerpen@pandora.be

Vrije Diamanthehandel

Address: Pelikaansstraat 62,
2018 Antwerp
Telephone: + 32 (0) 3 232 70 13
Fax: + 32 (0) 3 232 70 13

UNITED KINGDOM

The London Diamond Bourse and Club

Address: 100 Hatton Garden,
London EC1 8NX
Telephone: + 44 (0) 20 7404 4022
Fax: + 44 (0) 20 7831 3860
E-mail: ldbandclub@hotmail.com

GERMANY

Diamant- und Edelesteinboerse Idar – Oberstein e.V.

Address: P.O.Box 122220,
55714 Idar-Oberstein
Telephone: + 49 (0) 6781 94 420
Fax: + 49 (0) 6781 94 42 66

ITALY

Borsa Diamanti d' Italia

Address: Via Torino 21,
20123 Milano
Telephone: + 39 02 8646 1341
Fax: + 39 02 7202 2697

THE NETHERLANDS

Vereniging Beurs voor den Diamanthehandel

Address: Hogehilweg 14,
1101 CD Amsterdam
Telephone: + 31 (0) 20 696 22 51
Fax: + 31 (0) 20 696 51 71
E-mail: amsterdam@inter.nl.net

AUSTRIA

Diamant-Club Wien

Address: Spiegelgasse 2,
1010 Wien
Telephone: + 43 (0) 1 512 73 83
Fax: + 43 (0) 1 512 73 83
E-mail: info@diamant-club.at

APPENDIX 13 USEFUL INTERNET SITES

www.fao.org

On-line FAO databases (statistical, textual and graphical).

www.europa.eu.int

This site provides information about the European Union and gives links to many organisations working within the EU

www.tscentral.com

Overview of international trade fairs worldwide.

www.expobase.com

Website of international trade fairs.

http://europa.eu.int.

EU and links to Eurostat. Macro data on the EU.

http://mkaccdb.eu.int

Database of European Commission on import regulations, duties and trade barriers.

www.europages.com

Website for names and addresses of importers of precious and semi- precious stones.

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information

- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Manuals on subjects such as, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the AccessGuide database on European non-tariff trade barriers;
- CBI's Trade Documentation Centre offering demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services

CBI's computerized exporters' and importers' databases, containing regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export development programmes (EDP)

Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand-driven and flexibility are combined with fixed elements such as:

- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development

- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide -through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation

CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

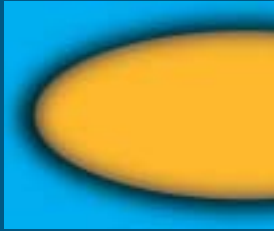
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