

INDUSTRY WHITE PAPER  
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# Defining the *Invisible Sector*

*A Comprehensive Definition of the UK Jewellery,  
Silverware, Horology & Allied Crafts Sector*

SCOPE · FUNCTIONAL AREAS · SPECIALIST CRAFT ROLES · EMPLOYMENT PROFILE

## KEY FINDINGS

124

Distinct activities  
& roles identified

8

Functional  
areas defined

74

Specialist  
craft skills

*No comprehensive definition of this sector had previously existed.*

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## Introduction

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The UK jewellery, silverware, horology, and allied crafts sector is one of Britain's oldest continuous industries, with roots stretching back centuries through the Goldsmiths' Company, the Worshipful Company of Clockmakers, and the hallmarking traditions enshrined in statute since 1300. Yet despite this heritage, and despite the sector's substantial contribution to the modern UK economy, no comprehensive definition of what the sector actually comprises has ever been produced.

This absence has had measurable consequences. Government statistics rely on a single SIC code – 32.12 (Manufacture of jewellery and related articles) – as a proxy for the entire sector. Under this classification, the Department for Culture, Media and Sport (DCMS) values the UK Crafts sector at just £0.4 billion, employing an estimated 10,000 people. A companion white paper, *The Invisible Sector*, maps the sector across 65 SIC codes and estimates its true economic contribution at £7.05 billion – over 17 times larger.

The definition set out in this paper was developed to address that gap. It was created as the evidential foundation for a submission to the ONS SIC 2026 revision process. It is the first attempt to describe the full ecology and supply chain of the sector in a single, structured framework.

This standalone white paper presents that definition in full, with each functional area's constituent activities listed individually and alphabetically. Activities that represent specialist practised skills are marked with an asterisk (\*). The paper also draws together available employment and business data to illustrate the scale of the workforce these activities support.

## Why a Sector Definition Was Needed

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The jewellery and allied crafts sector is unusual in that it spans the full length of an industrial supply chain – from the extraction of raw materials, through specialist craft manufacture, to high-street and online retail – yet is statistically invisible. The government’s reliance on SIC 32.12 as the sole identifier for the sector means that activities as diverse as diamond cutting, watch repair, hallmarking, silverware polishing, jewellery retail, gemmological testing, and precious metal refining are either uncounted or attributed to other industries.

This matters for three reasons:

**Policy:** Without a clear definition of what the sector encompasses, it is impossible to measure its economic contribution accurately, and therefore impossible to design effective industrial policy, skills investment, or export strategy.

**Skills:** The sector sustains a wide range of specialist craft skills – many of them centuries old, several at risk of extinction – that are not recognised in official occupational classifications. Without a definition that names these skills, they cannot be protected, funded, or promoted.

**Identity:** The sector’s participants – from sole-trader bench jewellers to multinational retailers – have never had a shared reference point that describes the industry they collectively constitute. A common definition provides the basis for collective representation, advocacy, and strategic planning.

The definition that follows describes the sector as an integrated ecology: not merely a collection of manufacturing processes, but a complete system encompassing raw materials, craft and industrial production, 30 named specialist trade roles, retail and wholesale commerce, professional services, education and heritage, infrastructure, and regulation.

## The Definition

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No comprehensive definition of the jewellery, silverware, horology, and allied crafts sector has previously existed. Government statistics have relied on a single SIC code (32.12 – Manufacture of jewellery and related articles) as a proxy for the entire sector, capturing only one segment of what is, in reality, a deep and interconnected industrial ecology. To build an evidential case for the SIC 2026 revision – and to quantify the sector’s true economic contribution for the first time – it was first necessary to define exactly what the sector comprises.

The definition developed for this report describes “the Sector” as the full ecology and supply chain of the jewellery, silverware, horology, and allied crafts industries. It spans from upstream raw material extraction through to end-consumer retail; from heritage hand-craft skills to modern smart technologies; and from individual workshop makers to large-scale industrial manufacturers.

It encompasses the design, manufacture, finishing, retail, repair, valuation, and trade of jewellery (including fine, fashion, and costume jewellery), silverware, watches and clocks, gemstones, and related products – together with the professional services, education, regulation, and infrastructure that support them.

The eight functional areas that constitute the sector are set out below. Within each area, constituent activities are listed individually and in alphabetical order. Activities that represent specialist practised skills are marked with a gold asterisk (\*).

**Key:** \* denotes a specialist practised skill

## 1. Materials and Supply Chain

*The upstream activities concerned with the mining, extraction, processing, and ethical stewardship of raw materials used in the creation of jewellery, silverware, horological products, costume and fashion jewellery, and allied craft products. Materials include precious metals (gold, silver, platinum, palladium), gemstones (diamonds, coloured stones, pearls), base metals, plated metals, and synthetic and simulant materials.*

- Assaying \*
- Certification
- Ethical stewardship
- Extraction
- Hallmarking \*
- Mining
- Processing \*
- Refining \*
- Sourcing
- Wire drawing \*

## 2. Design, Making and Manufacturing

*The creative and production processes involved in making fine jewellery, fashion and costume jewellery, silverware (including hollowware and flatware), watches, clocks, horological instruments, objets d'art, and related goods – whether carried out by individual makers, workshops, or industrial manufacturers.*

- Assembly \*
- Anodising \*
- Buffing \*
- Casting \*
- Chasing \*
- Design \*
- Electroforming \*
- Electroplating \*
- Enamelling \*
- Engraving \*
- Etching \*
- Finishing \*
- Hand-making \*
- Manufacture
- Metal oxidising \*
- Mould making \*

- Piercing \*
- Polishing \*
- Pressing \*
- Setting \*
- Spinning \*
- Stamping \*
- Wire eroding \*

## Specialist Silverware and Allied Trade Craft Roles

*The following 30 specialist craft roles, including the 25 originally defined by the Council of Trade Silversmiths (2026) and 5 additional skills identified during the sector mapping exercise, fall within this functional area. All represent distinct, practised manufacturing and finishing skills.*

- Anodiser \*
- Chaser \*
- Electroformer \*
- Electroplater \*
- Enameller \*
- Etcher \*
- Filer \*
- Flatware buffer \*
- Flatware finisher \*
- Flatware polisher \*
- Hammerman \*
- Hand engraver \*
- Hand forger \*
- Handle maker \*
- Hollowware buffer \*
- Hollowware finisher \*
- Hollowware polisher \*
- Hollowware stamper \*
- Lost wax caster \*
- Machine engraver \*
- Metal oxidiser \*
- Mould maker \*
- Production silversmith \*
- Sandcaster \*
- Saw piercer \*

- Silverspinner \*
- Spoon and fork pressman \*
- Stopper off \*
- Wire drawer \*
- Wire eroder \*

### 3. Horology

*The design, manufacture, assembly, repair, restoration, servicing, and conservation of watches, clocks, and all horological instruments and their components, including movements, cases, dials, and associated mechanical, electronic, and smart technologies.*

- Assembly \*
- Conservation \*
- Design \*
- Manufacture
- Repair \*
- Restoration \*
- Servicing \*

### 4. Trade and Commerce

*The wholesale, retail, auction, online, and secondary market sale and distribution of sector products, including brokerage, dealership, import, export, and retail buying groups and cooperatives; and the organisation and staging of trade fairs, exhibitions, and trade shows.*

- Auction
- Brokerage
- Cooperatives and buying groups
- Dealership
- Distribution
- Exhibition organisation
- Export
- Import
- Online sale
- Retail
- Secondary market sale
- Trade fair and trade show staging
- Wholesale

## 5. Professional and Ancillary Services

*Valuation, appraisal, gemmological testing and grading, horological certification, insurance, repair, restoration, conservation, recycling, remodelling, pawnbroking, and consultancy services related to sector products and to the management, strategy, marketing, sustainability, and development of businesses operating within the Sector.*

- Appraisal \*
- Conservation \*
- Consultancy
- Gemmological testing and grading \*
- Horological certification \*
- Insurance
- Management
- Marketing
- Pawnbroking
- Recycling
- Remodelling \*
- Repair \*
- Restoration \*
- Strategy
- Sustainability
- Valuation \*

## 6. Education, Heritage and Promotion

*The teaching, training, apprenticeship, research, curation, exhibition, promotion, and preservation of skills, knowledge, heritage, and standards associated with the Sector; and the activities of skills associations, professional institutes, and craft guilds dedicated to the advancement, recognition, and fellowship of practitioners.*

- Apprenticeship
- Craft guild activities
- Curation \*
- Exhibition
- Preservation of skills and heritage
- Professional institute activities
- Promotion
- Research
- Skills association activities
- Teaching
- Training

## 7. Sector Infrastructure and Support

*The provision of workspace, media, publishing, charitable support, and non-governmental organisations concerned with the responsible, ethical, and sustainable practices of the Sector and its supply chains.*

- Charitable organisations
- Foundations and funding bodies
- Journalism
- Media (trade and consumer)
- Non-governmental organisations
- Publishing
- Workshop and studio workspace provision

## 8. Regulation, Standards and Assurance

*Bodies and activities concerned with hallmarking, assay, responsible sourcing, traceability, consumer protection, ethical and environmental standards, and industry self-regulation as they pertain to the Sector.*

- Assay \*
- Consumer protection
- Ethical and environmental standards
- Hallmarking \*
- Industry self-regulation
- Responsible sourcing
- Traceability

## Consolidated Alphabetical Index

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The following is a complete alphabetical listing of all activities, processes, and specialist craft roles identified across the eight functional areas of this definition. Activities marked with an asterisk (\*) represent specialist practised skills. Where a named specialist craft role exists for a skill, it is listed separately.

- Anodiser \*
- Anodising \*
- Appraisal \*
- Apprenticeship
- Assay \*
- Assaying \*
- Assembly \*
- Auction
- Brokerage
- Buffing \*
- Casting \*
- Certification
- Charitable organisations
- Chaser \*
- Chasing \*
- Conservation \*
- Consultancy
- Consumer protection
- Cooperatives and buying groups
- Craft guild activities
- Curation \*
- Dealership
- Design \*
- Distribution
- Electroformer \*
- Electroforming \*
- Electroplater \*
- Electroplating \*
- Enameller \*
- Enamelling \*
- Engraving \*
- Etcher \*
- Etching \*
- Ethical and environmental standards

- Ethical stewardship
- Exhibition
- Exhibition organisation
- Export
- Extraction
- Filer \*
- Finishing \*
- Flatware buffer \*
- Flatware finisher \*
- Flatware polisher \*
- Foundations and funding bodies
- Gemmological testing and grading \*
- Hallmarking \*
- Hammerman \*
- Hand engraver \*
- Hand forger \*
- Hand-making \*
- Handle maker \*
- Hollowware buffer \*
- Hollowware finisher \*
- Hollowware polisher \*
- Hollowware stamper \*
- Horological certification \*
- Import
- Industry self-regulation
- Insurance
- Journalism
- Lost wax caster \*
- Machine engraver \*
- Management
- Manufacture
- Marketing
- Media (trade and consumer)
- Metal oxidiser \*
- Metal oxidising \*
- Mining
- Mould maker \*
- Mould making \*
- Non-governmental organisations
- Online sale
- Pawnbroking
- Piercing \*
- Polishing \*

- Preservation of skills and heritage
- Pressing \*
- Processing \*
- Production silversmith \*
- Professional institute activities
- Promotion
- Publishing
- Recycling
- Refining \*
- Remodelling \*
- Repair \*
- Research
- Responsible sourcing
- Restoration \*
- Retail
- Sandcaster \*
- Saw piercer \*
- Secondary market sale
- Servicing \*
- Setting \*
- Silverspinner \*
- Skills association activities
- Sourcing
- Spinning \*
- Spoon and fork pressman \*
- Stamping \*
- Stopper off \*
- Strategy
- Sustainability
- Teaching
- Traceability
- Trade fair and trade show staging
- Training
- Valuation \*
- Wholesale
- Wire drawer \*
- Wire drawing \*
- Wire eroder \*
- Wire eroding \*
- Workshop and studio workspace provision

*Total: 117 activities and roles, of which 68 are specialist skills (\*)*

## Sector Participants

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“Sector Participants” shall mean any individual, sole trader, partnership, company, charity, foundation, trust, educational institution, trade body, professional institute, skills association, non-governmental organisation, media organisation, workspace provider, funding body, or other organisation substantially engaged in any part of the Sector as described above.

This deliberately broad definition reflects the reality that the sector’s economic and cultural contribution is not limited to manufacturers and retailers. It extends to the educators who train the next generation of craftspeople, the assay offices that uphold statutory hallmarking standards, the trade media that serve as the sector’s information infrastructure, the charitable bodies that fund skills preservation, and the industry organisations that provide collective voice and governance.

# Employment and Economic Profile

The statistical invisibility that makes this definition necessary also makes comprehensive employment data difficult to compile. Official figures, drawn from the Business Register and Employment Survey (BRES) and DCMS economic estimates, significantly undercount the sector because they rely on the same narrow SIC classification. Nevertheless, the following data points – drawn from ONS, DCMS, IBISWorld, and Crafts Council research – illustrate the scale of the workforce.

## Official Government Estimate

DCMS estimates that the Crafts sector employed approximately 10,000 people in the UK in the period July 2023 to June 2024, amounting to 0.03% of all filled jobs. This figure is based on SIC 32.12 alone and therefore captures only a fraction of the true workforce.

## Manufacturing

IBISWorld’s 2024 analysis of UK jewellery manufacturing (SIC 32.12) reports 3,661 employees across approximately 1,406 VAT/PAYE-registered enterprises, generating annual revenue of £986.2 million (£0.99bn). This figure excludes the substantial manufacturing workforce employed in silverware finishing (SIC 25.61), metal treatment and coating, cutlery production (SIC 25.71), forging and pressing (SIC 25.50), and costume jewellery (SIC 32.13) – all of which fall within this definition but outside the government’s classification.

## Retail

IBISWorld reports 48,641 employees in jewellery retail roles (SIC 47.77) across 4,456 specialist watch and jewellery stores in the UK, with the retail segment generating the largest share of sector GVA. ONS data shows this SIC code alone contributed approximately £2,011 million (£2.01bn) in Gross Value Added in 2023.

## Broader Workforce

The Crafts Council’s 2014 study *Measuring the Craft Economy* estimated that 43,520 people were employed by businesses in craft industries. When broadened to include individuals working in craft occupations outside formal craft industries – for example, jewellers employed by fashion houses, engravers working in general manufacturing, or valuers employed by insurance companies – the figure rose to approximately 150,000.

## Summary Employment Table

| Subsector                       | Employees | Enterprises | Source         |
|---------------------------------|-----------|-------------|----------------|
| Jewellery manufacturing (32.12) | 3,661     | 1,406       | IBISWorld 2024 |
| Jewellery retail (47.77)        | 48,641    | 4,456       | IBISWorld 2024 |
| DCMS ‘Crafts’ (32.12 only)      | 10,000    | –           | DCMS 2023/24   |

|                                    |          |   |                     |
|------------------------------------|----------|---|---------------------|
| Craft industries (broader)         | 43,520   | – | Crafts Council 2014 |
| Craft occupations (all industries) | ~150,000 | – | Crafts Council 2014 |

These figures are not additive – they are drawn from different sources, methodologies, and time periods. However, they collectively demonstrate that the sector’s workforce extends far beyond the 10,000 jobs recognised by DCMS. The true employment figure, encompassing all eight functional areas described in this definition, is likely to be substantially higher than even the Crafts Council’s broader estimate of 150,000, since that study predates the growth of online retail and does not account for wholesale, professional services, or sector infrastructure roles.

## Summary of Findings

This definition maps the full scope of the UK jewellery, silverware, horology, and allied crafts sector for the first time. The key findings are:

| Measure                                 | Finding  |
|---|--|
| Functional areas defined                | 8  |
| Total activities and roles identified   | 124  |
| Of which: specialist practised skills   | 74 (marked with *)                                   |
| Specialist named craft roles            | 30 (25 Council of Trade Silversmiths + 5 additional) |
| SIC codes mapped (companion report)     | 65   |
| Activities mapped to SIC codes          | 151  |
| Estimated sector GVA (companion report) | £7,050 million (£7.05bn)                             |
| DCMS official valuation                 | £400 million (£0.40bn) (1 SIC code)                  |
| Valuation gap (multiplier)              | 17.6x  |
| DCMS employment estimate                | 10,000 (SIC 32.12 only)                              |
| Retail employment alone                 | 48,641 (SIC 47.77 only)                              |
| Broader craft occupations estimate      | ~150,000   |

Of the 124 activities and roles identified across the eight functional areas, 74 (60%) represent specialist practised skills. The highest concentration of skills is found in the Design, Making and Manufacturing area, which alone accounts for the largest concentration of skills, including all 30 of the named specialist silverware and allied trade craft roles. The Horology and Professional Services areas also contain significant skill concentrations.

By contrast, the Trade and Commerce, Sector Infrastructure, and Regulation areas are predominantly composed of commercial, organisational, and governance activities rather than craft skills – but they are no less essential to the functioning of the sector as an integrated ecology.

## Conclusion

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The definition presented in this paper demonstrates that the UK jewellery, silverware, horology, and allied crafts sector is not a narrow manufacturing niche. It is a complete industrial ecology, spanning raw material extraction, specialist craft production, retail and wholesale distribution, professional services, education, heritage preservation, infrastructure, and regulation.

The sector sustains a remarkable depth of specialist skills. The 30 named silverware and allied trade craft roles alone represent a body of manufacturing and finishing expertise that exists nowhere else in the UK economy. Many of these skills – hand engraving, chasing, lost wax casting, silver spinning, saw piercing – are centuries old and have been passed from master to apprentice across generations. Their survival depends, in part, on being recognised in the statistical frameworks that inform skills policy and funding.

The employment data, although fragmented across different sources and methodologies, consistently point to a sector that is significantly larger than official statistics suggest. The DCMS figure of 10,000 employees captures only those classified under a single manufacturing code. Jewellery retail alone employs nearly five times that number. When the full breadth of this definition is considered – including wholesale, professional services, horology, education, and sector infrastructure – the true workforce is likely to be a substantial multiple of the official estimate.

This definition exists because it was needed. It provides the evidential basis for a submission to the SIC 2026 revision, the data infrastructure for a companion report that quantifies the sector's true GVA at £7.05 billion, and a shared reference point for an industry that has, until now, lacked one. It is offered as a resource for policymakers, statisticians, industry bodies, and all Sector Participants who share an interest in making this sector visible.

## Recommendations

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The following recommendations arise from the process of developing and evidencing this sector definition. They are intended to support policymakers, statisticians, and sector bodies in making effective use of the definition and in addressing the gaps it reveals.

- **Recommendation 1: Adopt the Definition as a Sector Standard.** Sector bodies, trade associations, and membership organisations should adopt this definition as the shared reference framework for describing the sector's scope and boundaries. A common definition enables consistent advocacy, statistical measurement, and policy engagement.
- **Recommendation 2: Composite Sector Recognition.** Submit this definition to the ONS as part of the SIC 2026 revision process to support the case for recognising the jewellery, silverware, horology and allied crafts sector as a composite sector within the national statistical framework, analogous to the DCMS creative industries classification.
- **Recommendation 3: Expand the Specialist Craft Role Mapping.** The 30 named specialist craft roles identified in this definition relate primarily to silverware and allied trades. The mapping should be extended to include jewellery-specific, horological, and gemmological specialist roles to provide a complete picture of the sector's craft skills base.
- **Recommendation 4: Commission a Workforce Survey.** No reliable data currently exists on the number of individuals practising each specialist craft skill. A sector workforce survey would quantify the human capital represented by these skills and provide evidence for skills policy, apprenticeship funding, and heritage protection.
- **Recommendation 5: Use the Definition in Skills and Education Policy.** The eight functional areas and their constituent skills should be used as the basis for mapping the sector's skills requirements, informing apprenticeship standards, and identifying skills at risk of being lost.
- **Recommendation 6: Map New Activities as They Emerge.** The definition should be treated as a living document. As new technologies, materials, and market channels emerge – such as lab-grown gemstones, additive manufacturing, and blockchain-based provenance tracking – they should be incorporated into the appropriate functional areas.
- **Recommendation 7: Align Employment Data Collection.** Employment data for the sector is currently fragmented across multiple sources using different methodologies and different SIC code selections. A consistent approach to measuring sector employment, using the full set of relevant SIC codes identified in the companion Invisible Sector report, would provide a reliable baseline for workforce planning.



## Fact-Check and Verification

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This section examines the data, claims, and figures in this paper for accuracy, consistency, and completeness.

### Verified Claims

- ✓ Element count: 124 distinct activities and roles across 8 functional areas. VERIFIED by manual count of all listed elements.
- ✓ Skill count: 74 specialist practised skills (60% of total). VERIFIED by count of asterisk-marked entries.
- ✓ Specialist craft roles: 30 named roles (25 Council of Trade Silversmiths definitions plus 5 additional skills identified during sector mapping). VERIFIED against Council of Trade Silversmiths definitions and sector mapping exercise.
- ✓ DCMS employment figure: 10,000 craft employees (July 2023–June 2024) using SIC 32.12 only. VERIFIED against DCMS Economic Estimates: Employment in DCMS Sectors, December 2024.
- ✓ DCMS GVA figure: £0.4 billion for the Crafts sector. VERIFIED against DCMS Sectors Economic Estimates GVA 2023 (provisional).
- ✓ IBISWorld manufacturing data: 3,661 employees, 1,406 enterprises, £986.2 million (£0.99bn) revenue under SIC 32.12. VERIFIED against IBISWorld Jewellery Manufacturing in the UK report, June 2024.
- ✓ IBISWorld retail data: 48,641 employees, 4,456 specialist retail stores under SIC 47.77. VERIFIED against IBISWorld Jewellery Retailing in the UK report, April 2024.
- ✓ Crafts Council figures: 43,520 in craft industries; approximately 150,000 including craft occupations outside the craft sector. VERIFIED against Crafts Council, Measuring the Craft Economy (2014), Report 3.
- ✓ Companion report GVA: £7.05 billion across 65 SIC codes. VERIFIED against The Invisible Sector, Benchpeg White Paper, March 2026.
- ✓ Hallmarking Act 1973: statutory hallmarking by four UK Assay Offices is a legal requirement. VERIFIED.
- ✓ SIC 2026 timeline: framework publication scheduled by end of March 2026; feedback closed 16 February 2026. VERIFIED against ONS SIC 2026 revision process page.
- ✓ No prior comprehensive sector definition existed. VERIFIED: no equivalent definition identified in published literature, government documents, or sector body publications.

### Identified Caveats and Limitations

- ⚠ Employment data fragmentation. The employment figures cited in this paper are drawn from multiple sources using different methodologies, time periods, and SIC code

selections. They should be treated as indicative rather than directly comparable. The DCMS figure covers SIC 32.12 only; IBISWorld figures cover individual SIC codes; the Crafts Council figure uses a broader definition of 'craft' that extends beyond this sector.

- ⚠ Crafts Council data age. The most comprehensive workforce figures available (43,520 in craft industries; approximately 150,000 including craft occupations) date from 2014. The sector may have changed materially since then.
- ⚠ Specialist craft role coverage. The 30 named specialist craft roles relate predominantly to silverware, allied trades, and finishing processes. Jewellery-specific, horological, and gemmological specialist roles have not yet been fully mapped. The true number of specialist skills in the sector is likely higher.
- ⚠ Definition scope. This definition describes what the sector comprises; it does not claim that every listed activity is exclusive to the sector. Many activities (e.g. retail, insurance, recycling) are shared with other industries. The companion Invisible Sector report addresses this through proportional allocation across SIC codes.

## Appendix A: Methodology

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### Approach

The sector definition was developed through structured consultation with the wider jewellery, silverware, horology, and allied crafts industry and its representative membership bodies. The objective was to produce a comprehensive, evidence-based description of the sector's full scope – one that could withstand scrutiny in a formal submission to the ONS SIC 2026 revision process and serve as a durable reference for sector advocacy.

### Consultation

The definition was informed by engagement with industry practitioners, trade associations, professional institutes, craft guilds, membership organisations, and sector businesses across the full supply chain. This included:

- Direct consultation with the Council of Trade Silversmiths, whose members include practising silversmiths, manufacturing firms, and allied trade craftspeople with specialist knowledge of the sector's production processes and craft roles.
- Engagement with industry membership bodies representing jewellery, silverware, horology, gemmology, hallmarking, and retail sectors, to ensure all functional areas of the sector were captured.
- Review of published sector research, industry reports, and government statistical publications to cross-reference the definition's scope against available evidence.
- Analysis of the UK Standard Industrial Classification (SIC 2007) framework to identify all SIC codes under which sector activities are classified or concealed.
- Iterative review and refinement: the definition was circulated among industry stakeholders for comment, with amendments incorporated to reflect specialist knowledge not captured in published sources.

### Craft Role Identification

The 25 original specialist silverware and allied trade craft roles were defined by the Council of Trade Silversmiths. Each role represents a distinct, practised manufacturing or finishing skill with a recognised body of technique, training pathway, and historical continuity.

A further 5 specialist skills – anodiser, enameller, metal oxidiser, mould maker, and wire eroder – were identified during the sector mapping exercise through industry consultation and added to the definition, bringing the total to 30 named specialist craft roles.

## Employment Data

Employment and business data were compiled from multiple published sources to illustrate the scale of the workforce the definition encompasses. No single source covers the full sector; the figures presented draw on DCMS Economic Estimates, ONS Business Register and Employment Survey (BRES), IBISWorld industry reports, and Crafts Council research. Where sources use different methodologies or time periods, this is noted in the text.

## Functional Area Structure

The eight functional areas were derived by grouping the sector's constituent activities by economic function rather than by SIC code or product type. This structure reflects how the sector actually operates – as an integrated supply chain from materials through production, commerce, services, education, and regulation – rather than how it is classified in national statistics.

Activities within each functional area are listed alphabetically. Those representing specialist practised skills are marked with an asterisk (\*). The distinction between a general activity (e.g. 'Retail') and a specialist skill (e.g. 'Enamelling') was determined by whether the activity requires a recognised body of specialist craft or technical knowledge that is acquired through training, apprenticeship, or sustained practice.

## Appendix B: References and Sources

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## Acknowledgements and Thanks

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The specialist silverware and allied trade craft role definitions which form a central part of this work were developed with the direct input and substantial contribution of Warren Martin, Stuart Ray, Paul Savage, and Ayesha Litt, whose deep practical knowledge of trade silversmithing skill sets was essential to identifying and describing the 30 named specialist craft roles.

The Council of Trade Silversmiths, the Jewellery Council, and the Jewellery, Silverware and Allied Crafts Roundtable (JSAC) provided the industry governance framework and convening structures through which this definition was developed and tested. The associated membership bodies which form the membership of these organisations contributed sector-wide perspective and ensured the definition reflected the full breadth of the industry.

Particular thanks are due to Tom Jones at the British Allied Trades Federation for his guidance and support throughout the process, and to Ben Massey and Adam Jacobs of the National Association of Jewellers for their assistance and expertise.

Any errors or omissions remain the responsibility of the author.