Market survey and analysis

1) Market size signals, 2024–2025

Use these as Total Addressable Market anchors, then size your Serviceable Available Market as the premium, small-batch, or heritage slice you plan to serve.

- Mechanical and luxury watches. Global luxury watch market about 54 billion dollars in 2024, with healthy growth. Mechanical watches specifically about 45.6 billion dollars in 2024. (Fortune Business Insights)
- Ceramic tableware and artisan porcelain. Global ceramic tableware about 12.4 to 18.8 billion dollars in 2024–2025, mid-single digit growth. Use 12 to 19 billion dollars as a band. (Global Market Insights Inc.)
- Precision optics. Precision optics about 26 to 29 billion dollars in 2024, strong 7 to 13 percent CAGR outlook. (Precision Business Insights)
- Vinyl ecosystem, as a proxy for precision analog components. Vinyl records 1.9 to 2.2 billion dollars in 2024, growing. Add turntables and tone-arms as an adjacent SAM. (IMARC Group)
- Specialty paper and artisanal printing inputs. Specialty paper 27.9 to 36.7 billion dollars in 2024. Your heritage slice is the high-value grades for letterpress, washi-like stocks, and packaging. (Verified Market Research)
- Textile, with a heritage denim slice. Global denim jeans 86.7 billion dollars in 2024. Selvedge heritage slice estimated at roughly 2.1 billion dollars in 2024. (Grand View Research)
- Fermentation foods. Soy sauce alone 38 to 56 billion dollars in 2024, steady growth. Sake is much smaller but rising in export markets. Use 9 to 13 billion dollars through 2030, and note UK growth as a signal market. (Fortune Business Insights)

These sectors match your “high-priority” list where skills are tacit, equipment is relocatable, and quality can be certified.

2) Competitor map

Focus on capability archetypes, not only brands. This mirrors your diaspora-led operating model and split-process idea.

1. Legacy origin SMEs
   Makers in Japan, Korea, Taiwan, and parts of Europe with aging owners. Strength, lineage and tacit quality. Weakness, succession and labor. Threat, acquisition or closure.
2. Consolidated luxury groups and independents
   Large groups continue to buy scarce horology and craft capability to defend scarcity and margin. Example, LVMH’s purchase of L’Epée 1839 to deepen mechanical know-how. (Reuters)
3. Quality contract manufacturers in host regions
   Vietnam, Thailand, Bangladesh, Mexico, Portugal, and Türkiye. Strength, process control, trained labor, SEZ benefits. Weakness, authenticity gaps without master stewardship. This is your target partner set.

4. Refurbishers, auctioneers, and salvage brokers
   Players who source and restore vintage looms, presses, lathes, kilns, and optics kit. They control the asset flow and spares. You compete by bundling assets with training cells, provenance, and QC rituals.

5. Tech-assist platforms
   AR work-instruction vendors, SPC dashboards, and digital twin toolchains. They are complements to your "sensory lexicon" and ritualized QC model, not substitutes.

Positioning for you

- Be the Salvage SPV plus Training Cell operator that stitches 1, 3, and 5 together, with diaspora principals as custodians.
- Sell certified drops and white-label production with QR provenance and public QC bands.

3) Cost of loss, by sector or type

Use two buckets in every case: tangible and intangible. Tie each to a measurement so you can defend value in boardrooms and with funders. The examples below show what to capture and how to price it.

A. Precision analog components, vinyl and audio

- Tangible
  Revenue at risk. Backlog value from premium turntable parts and cartridges, plus accessories tied to the format growth curve. Use orders lost × average margin. Growth data from the vinyl trend supports future loss multipliers. (IMARC Group)
  Replacement cost of capability. Appraised value of machines plus rebuild, controls retrofit, and spares. Add 6 to 12 months of operator training cost.
- Intangible
  Signature sound profile. Loss of lineage-specific acoustic targets you document in your sensory lexicon. Price as brand premium erosion per unit.

B. Ceramics and porcelain

- Tangible
  Export and hospitality revenue at risk in the 12 to 19 billion dollar market band. Price by the share your line serves times contribution margin. (Global Market Insights Inc.)
  Kiln downtime and scrap. Calculate as hours lost × hourly contribution, plus disposal and re-fire energy.
- Intangible
  Loss of "ring sustain," pour line, glaze feel. These are your core differentiators. Track with your lexicon cards, then estimate the premium at risk when those cues vanish.

C. Mechanical and luxury watches

- Tangible
  Unit margin on complications and hand-finished movements in a 45 to 54 billion dollar space. Calculate lost lifetime value of collectors if lead times spike or finishing quality drifts. (Grand View Research)

- Intangible
  Guild status and maker reputation. Price as resale value delta and warranty claims due to finish drift. Track Cp/Cpk for finishing dimensions and correlate to returns.

D. Precision optics

- Tangible
  Contract penalties in aerospace, medical, and imaging if manual finishing capacity disappears. Use missed-delivery penalties plus requalification costs. Market size context 26 to 29 billion dollars. (Precision Business Insights)

- Intangible
  Tolerance rituals and bench craft that enable yield on difficult curvatures. Losing these raises risk in new product ramps. Price as launch delay cost per month.

E. Textiles, incl. indigo and selvedge

- Tangible
  Heritage denim slice about 2.1 billion dollars. Each shuttered loom removes unique fabric signatures. Price loss as unfilled POs × premium per meter. (MarketIntelo)

- Intangible
  Dye terroir and hand of the edge. Codify with lexicon bands and include a brand premium factor on limited drops.

F. Fermentation foods, incl. soy sauce and sake

- Tangible
  Market anchors. Soy sauce 38 to 56 billion dollars. Sake 9 to 13 billion dollars to 2030. Price risk as premium SKUs lost and contract brew fees foregone. (Fortune Business Insights)

- Intangible
  Microbiome and place memory. Losing cedar-vat or koji practice erodes taste cues. Price as brand equity loss in export markets where category growth is visible. Use UK sake momentum as signal. (The Guardian)

4) A simple worksheet you can use

For each target line, calculate:

1. Direct revenue at risk
   = last 24 months average revenue × probability of shutdown in next 36 months

2. Contribution margin at risk
   = direct revenue at risk × gross margin

3. Capability replacement cost
   = machine appraisal + rebuild and controls retrofit + spares + 18-month training payroll

4. Brand premium at risk
   = average unit premium over commodity × units sold to loyal buyers × churn risk from loss of key cues

5. Ecosystem spillover
   = tourist spend, supplier income, and micro-vendor lane revenue tied to the shop. Use a local multiplier of 1.3 to 1.6 as a defensible range.

Sum 1 to 5 to get "total cost of loss." Then compare to the "diaspora training cell" cost: capex for salvage and shipping, zone setup, master stipends, and AR/twin toolchain. Your Part 1–3 model shows the counterfactual spend needed to preserve capability with audits, provenance, and rituals.

5) Where this plugs into your thesis

- Use the market anchors above to size TAM and defend pilot selection. Start in sectors with high premium retention and short training cycles.
- Differentiate on identity continuity. Diaspora interpreter-trainers, ritualized crown steps, and public QC bands are the moat.
- Show investors the avoided loss. Present "cost of loss" vs "cost to preserve" per line, then show price premium retention in limited certified drops.

If you want, I can turn this into a one-page dashboard with sector picks, market sizes, and your pilot ROI model using your Part 1–3 language.