



# China Sportswear Industry Report, 2011-2012

Jun 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

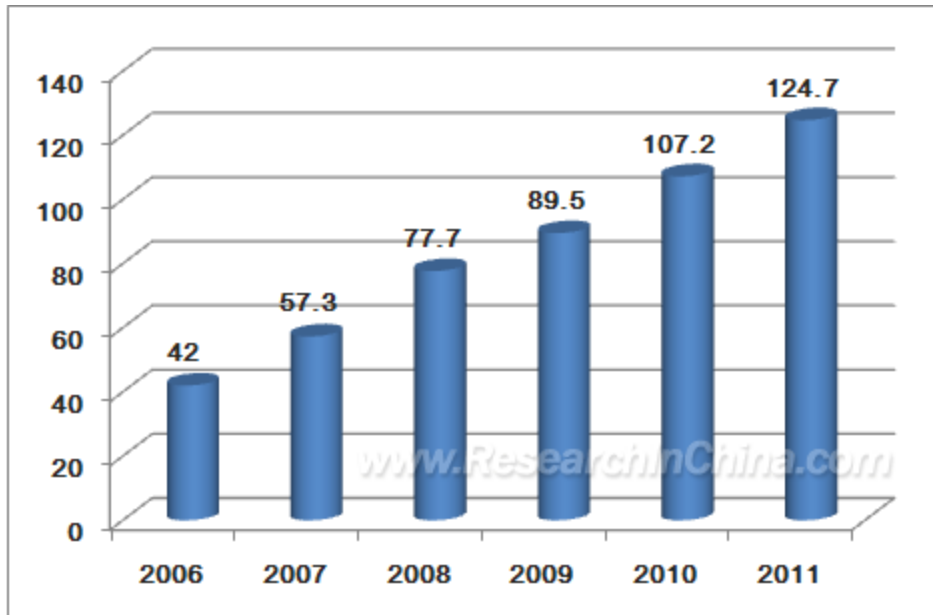
## INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, and China General Administration of Sport etc.

## Abstract

With rising per capita disposable income, the demand for sportswear including sports shoes and garments among consumers is soaring in recent years. In 2011, the sportswear market size in China hit RMB124.7 billion.

### Sportswear Market Size in China, 2006-2011 (RMB bn)



Source: ResearchInChina; "China Sportswear Industry Report, 2011-2012"

In Chinese sportswear market, international brands like Nike, Adidas, Kappa, Puma and FILA occupy high-end market, while medium-end market is dominated by domestic companies such as Anta and Li-Ning. In the below-200-yuan low-end consumer market, representatives consist of Xtep, PEAK, 361° and ERKE.

In China's sports shoe market, overseas brands cover Nike, Adidas, Puma, Reebok, FILA, Mizuno, UYBTO, Kappa, etc, and domestic ones comprise Li-Ning, Anta, Xtep, 361°, ERKE, PEAK, Jordan, Deerway and GRN. The high-end market is held by Nike, Adidas, Reebok, etc, and in the medium-end market, major players are Kappa and Li-Ning.

#### The report highlights the following aspects:

Development of Chinese sportswear Industry: status quo, market scale, operating mode, market segments, competition characteristics & pattern, development tendency, etc;

Leading Chinese sportswear businesses: operation and development of 14 key domestic enterprises including Li-Ning and Anta.

Li-Ning is the largest sportswear producer and seller in China, with the market share in China reaching 7.2% by sale in 2011. However, Li-Ning has seen decline in its business performance and been almost caught up by Anta in recent years. Although Li-Ning made efforts to control the expansion of retail outlets in 2011, it ranked the No.1 with retail outlets numbering 8,299.

Anta Sports has experienced the fastest development in recent years among its domestic counterparts, with the market share of 7.1% in China. The robust growth was mainly attributable to accurate price positioning of products as well as rapid expansion in the second-and third-tier cities.

Nike has long been maintaining its leading position in Chinese market. In FY2011, the Nike's revenue from Greater China harvested USD2.06 billion (RMB13.1 billion), just behind that each from North America and Western. Meanwhile, China is also the largest outsourcing and purchasing region for Nike.

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- 1.1 Development of China Sports Industry
- 1.2 Status Quo of China Sportswear Industry

### 2. Prospect of China Sportswear Industry

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