



**China Outdoor Gear Industry Report,  
2013-2016**

**Jun. 2014**

## 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

## 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 Company Reports, and National Bureau of Statistics of China etc.

## Abstract

With the rise of outdoor sports, the outdoor gear industry has gradually developed in China. Total retail sales of China outdoor gear industry registered a CAGR of 42.9% during 2005-2013, and reached RMB 18.05 billion in 2013, jumping by 24.3% year on year.

Sales channels of China outdoor gear industry consist mainly of professional outdoor store, market store and others including e-commerce. In 2007, the number of professional outdoor stores almost tied that of market stores. However, at the end of 2013, the number of market stores has expanded to 7,716, more than three times as many as professional outdoor stores, occupying 73.9% of total stores in outdoor gear market.

In the meantime, percentage of outdoor stores' retail sales shrank significantly, while that of other channels including e-commerce expanded rapidly, reaching 19.7% in 2013, up 16.2 percentage points against 2007.

At present, almost all global outdoor brands have entered China, with growth rate decelerating, whereas Chinese local brands are still increasing. As of the end of 2013, there were 891 outdoor brands in China, of which 458 were Chinese local ones (including Tread, Kolomb, Camel, Kroceus under Shanghai Challenge Sports Products

Co., Ltd., Jihua Outdoors under Jihua Group, Anemaqen under Sanfo Outdoors and Shehe).

However, foreign brands hold about 70% of China's outdoor gear market, assuming absolute superiority. In 2013, Columbia and The North Face were the top two players in China outdoor gear market with a share of 16.9% and 14.0%, respectively.

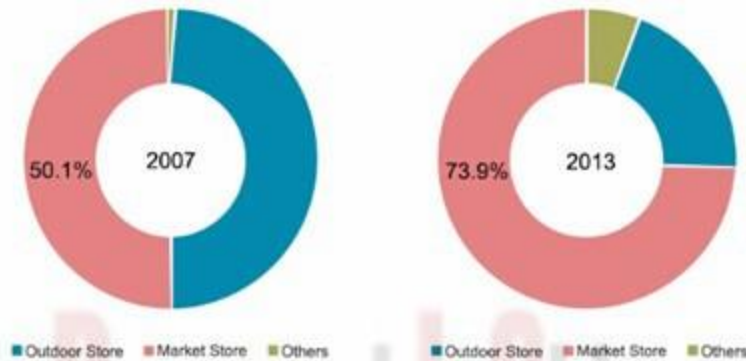
Tread is the largest local company which specializes in outdoor gear, ranking third in China outdoor gear market, with a share of 8.0% in 2013. As famous Chinese local outdoor brands, Kolomb and Camel ranked eighth and ninth with a market share of 3% each.

China Outdoor Gear Industry Report, 2013-2016 highlights the following:

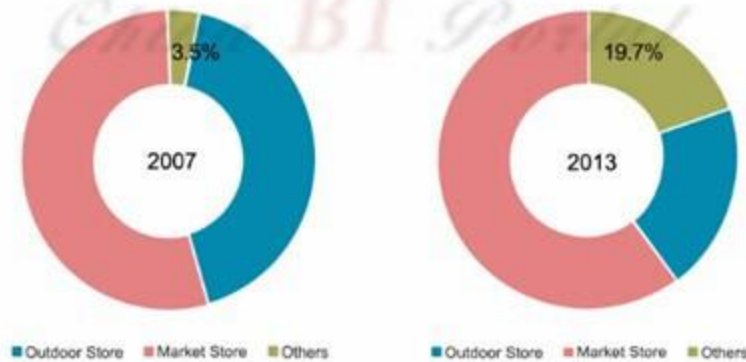
- ✘ Development background and market capacity of foreign outdoor gear industry;
- ✘ Market size, sales channels and competitive landscape of China outdoor gear industry;
- ✘ Economic environment, policy environment and development trend of China outdoor gear industry;
- ✘ Operation, development in China and outlook of 5 global and 8 Chinese outdoor gear companies.

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Store Number Structure Of Outdoor Gear ( by Channel ) in China, 2007 Vs 2013



Retail Sales Structure of Outdoor Gear (by Channel) in China, 2007 Vs 2013



Source: China Outdoor Gear Industry Report,2013-2016,by ResearchInChina

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