



**China Outdoor Gear Industry Report,
2015-2018**

Aug. 2015

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

In recent years, the fact that outdoor activity is becoming increasingly prevalent has promoted the rapid development of Chinese outdoor gear industry. The total retail sales of China's outdoor gear industry reached RMB20.08 billion in 2014, jumping by 11.2% year on year.

Sales channels of China outdoor gear industry cover professional outdoor stores, department stores, e-commerce and others, among which department store channel witnesses swift development. In 2014, the number of outdoor gear shops in department stores expanded quickly to 7,872 which was 3.7 times that of professional outdoor stores, and outdoor gear sales in those department stores amounted to RMB11.65 billion, occupying 58% of the total retail sales. By contrast, under the impact of e-commerce and department store channels, professional outdoor stores see a decreasing proportion of the total retail sales, such as 18.6% in 2014.

At present, most foreign brands have entered China and occupied about 70% share of the Chinese outdoor gear market, but the homegrown brands have sprung up. In 2014, the number of domestic Chinese brands rose by 46 to 504, including 354 core brands such as Toread, MobiGarden, Sanfo Outdoors, Camel and Kolumb.

Toread is the only Chinese outdoor gear giant that can compete with foreign counterparts, boasting three brands, namely Toread, ACANU and Discovery Expedition, which are absorbed in different areas. In 2014, Toread seized the market share of 8.5%. Currently, the company is building an ecosystem involving outdoor travel, sport and the Internet. In June 2015, the company issued a non-public offering plan to raise RMB2.105 billion for the construction of Toread Cloud Project, camping, skiing and outdoor multifunctional experience projects, Lvye outdoor travel O2O projects.

MobiGarden is specialized in R & D, design, production and marketing of camping tents, outdoor clothing and other outdoor gear, enjoying 2.3% share in the Chinese outdoor gear market in 2014. In January 2015, MobiGarden applied for IPO and intended to raise a total of RMB384 million for a "one-stop" marketing channel construction project, O2O management system and information technology projects, storage centers and showrooms.

The leading outdoor gear retailer Sanfo Outdoors grasped 1.5% share in the Chinese outdoor gear market in 2014. While acting as an agent of foreign brands, Sanfo Outdoors has established two own brands "Sanfo" and "Anemaqen", which generated the revenue of RMB4.895 million (accounting for 1.6% of the total) in 2014.

Retail Sales Structure of Outdoor Gear in China by Channel, 2013 vs 2014



Source: China Outdoor Gear Industry Report, 2015-2018 by ResearchInChina

The report highlights the followings:

- ✘ Status quo (including development background and market capacity) of foreign outdoor gear industry;
- ✘ Status quo, competitive landscape, operating environments and development trends of China outdoor gear industry;
- ✘ Operation, outdoor gear business, prediction and prospects of 5 global and 9 Chinese outdoor gear companies.

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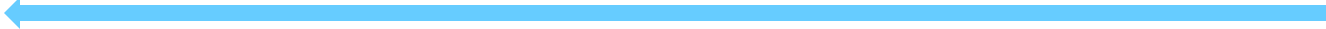
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