China Outdoor Gear Industry Report, 2018-2023

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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.

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Abstract

After its boom between 2008 and 2012, the Chinese outdoor gear market started to slow down in 2013 and witnessed a decade-low growth rate in 2017 with annual retail sales of RMB24.46 billion, representing a rate of only 3.2%, compared with over 20% in 2013 and even more than 50% in 2011.

Despite a slowdown, the outdoor gear industry in China may sustain single-digit growth rate over the next two years, as outdoor sports become more diversified and popular. Compared with the United States and European countries, China is still home to a growing rather than mature outdoor gear market. Hence, it is expected the Chinese outdoor gear market will maintain the momentum of steady growth over the next five years.

Outdoor gear is sold primarily via three channels in China: outdoor gear shops, department stores and E-commerce, with the second playing a leading role (a share of over 40% in 2017). While retail sales of outdoor gear declined in department stores, E-commerce has gained momentum and new channels like group buying, communities and clubs have emerged in recent years. Enterprises are striving to foray into every channel and engage in differentiated operations.

The Chinese outdoor gear market is virtually shared by domestic and foreign brands, with the former focusing on the low-end market and the latter, represented by Columbia and The North Face, dominating the middle- and high-end market. Local Chinese outdoor brands recorded shipments of nearly RMB7 billion in 2017, sweeping 50.5% of the country's total. As local brands make breakthroughs in channel and quality of products, their market share will rise further.

Toread, the largest Chinese outdoor brand, had a market share of about 10% in 2017, a sharp fall over the previous years, largely due to its attempts for diversified development and cuts in investments for primary operations in the last three years. The company announced its re-focus on main businesses and spun off and withdrew from the businesses irrelevant to the primary outdoor business in 2017. Given this, the company is predicted to enjoy rapid expansion in outdoor gear business for the next couple of years.

Shoes and apparel make up over 60% of the outdoor gear market. With the development of pan-outdoor and light outdoor, outdoor shoes and apparel will become more lightweight and mass-oriented. Meanwhile, in order to meet personalized and differentiated demands of customers, outdoor shoes and apparel will become more fine and specialized.

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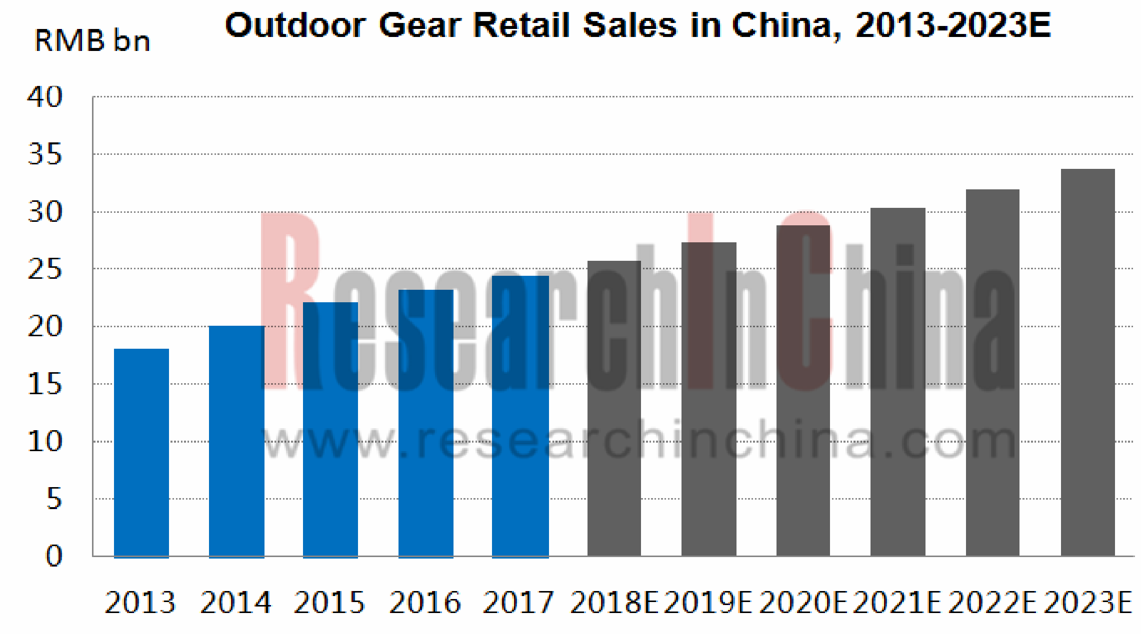
China Outdoor Gear Industry Report, 2018-2023 highlights the followings:

◆Global outdoor gear market (size, development and key brands in major countries);
◆Chinese outdoor sports market (size, drivers, and features & trends of development);
◆Chinese outdoor gear market (size, sales channel, brand composition, development pattern, competitive landscape, development trends, etc.);
◆Major Chinese outdoor gear market segments (apparel, shoes, backpacks, equipment) (status quo, development trends, etc.)
◆7 Global outdoor gear enterprises (operation, layout in China, etc.);
◆15 Chinese outdoor gear enterprises (operation, outdoor gear brands & channels, customers and suppliers, etc.).



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