

# China Outdoor Gear Industry Report, 2019-2025

Aug. 2019

## 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

As people earn more, the pursuit of spiritual growth and health conduces to the thriving outdoor gear market whose size was more than \$60 billion (up over 15% YoY) in 2018 and is expected to be worth \$67.8 billion in 2019 and at least \$100 billion in 2025.

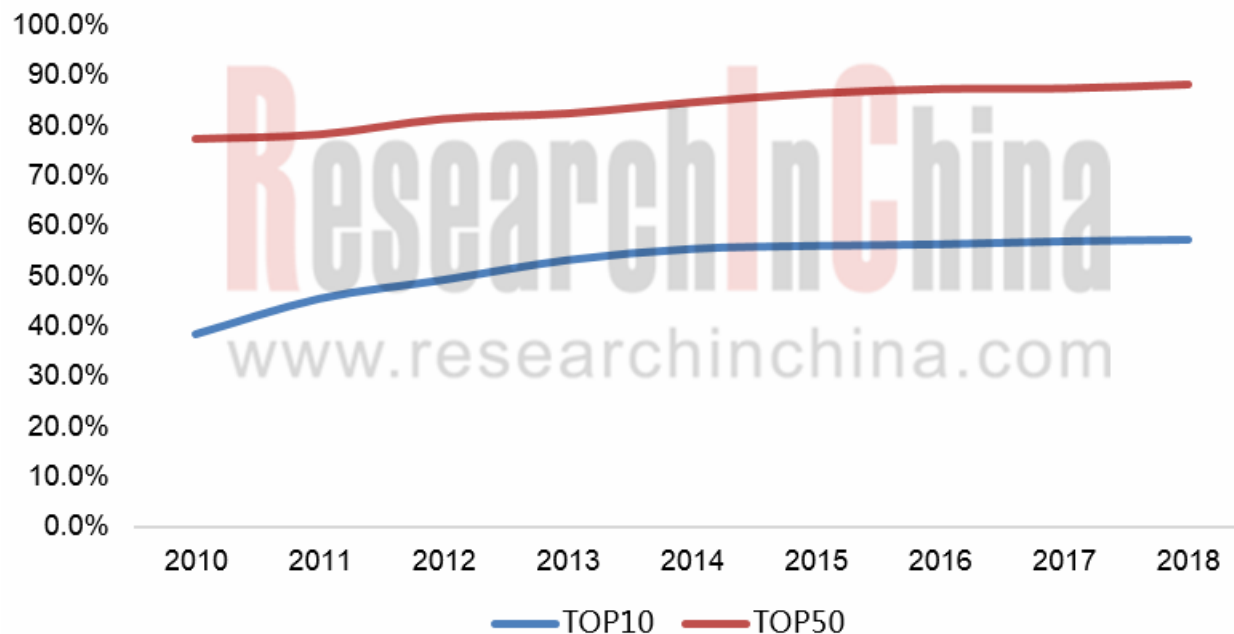
As a major consumer of outdoor gears worldwide, in 2018, China saw total retail sales of outdoor gears edge up 2.1% year on year to RMB24.98 billion (approximately \$3.77 billion, at exchange rate: 1 US dollar = 6.6174 yuan), showing a CAGR of 4.0% between 2015 and 2018, far lower than a rate of 29.5% from 2010 to 2014. As the Chinese outdoor gear market levels off, it will sustain an AAGR of 3%-5% during 2019-2025.

In recent years, the Chinese outdoor gear market was characterized as follows:

1. Segment: Apparel still prevailed in the market, accounting for 45.3% of total outdoor gear sales in 2018; camping equipment and shoes made up over 10%. As consumers know more about outdoor sports and grow mature for the years, tools and apparatus has been developing faster, with a market share of more than 20.0% in 2018; besides, these products using new technology offer new improvements, which in turn fuel consumption.
2. Sales channel: brick-and-mortar retail stores were still a mainstay but grew slowly; e-commerce channels occupied the most, or virtually 41.4% of total sales in 2018, albeit in the smallest number. As mainstream e-commerce platforms cost more and become less competitive, new media platforms begin to come to the fore, or will even be a key stimulus for the growth of e-commerce channels.
3. Competitive pattern: of the roughly 935 outdoor gear brands globally in 2018, Chinese brands swept a combined 52.4%, around 40 percentage points higher than that in 2000. Yet, the dislocation and compatibility among outdoor gear brands in China led to a high and almost unchanged industry concentration, though there had been a surge in number of brands. The collective market share of the top ten Chinese brands hovered at 55% after 2014.

4. A steady growth in outdoor gear consumers: in 2018, there were 142 million people going in for pan-outdoor sports in China, an increase of 12 million compared with 2013 when 130 million did, with a CAGR of 1.8% from 2013 to 2018.

## Outdoor Gear Market Concentration in China, 2010-2018



Source: ResearchInChina

The popularity of sports items such as cross country running, self-driving trip and skiing will give outdoor gear market a big boost. In 2018, a 9.1% increase in number of skiers in China contributed to a 25% jump in sales of snowboards. What's more, sales of leisure & camping equipment and outdoor sticks in the country soared by over 60% in 2018.

China Outdoor Gear Industry Report, 2019-2025 highlights the following:

- ◆ Outdoor gears (definition, classification, etc.);
- ◆ Global outdoor gear market (size, number of consumers, consumption structure, main regional markets (Europe, USA and South Korea));
- ◆ Chinese outdoor gear market (environment, characteristics and trends);
- ◆ Chinese outdoor gear market (development history, size, sales channel, brand composition, business model, etc.);
- ◆ Major outdoor gear market segments (apparel, shoes, backpacks, equipment, etc.) (size, brands, development trends, etc.);
- ◆ 7 global and 15 Chinese outdoor gear companies (operation, revenue structure, outdoor gear business, etc.).

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