

China Sportswear Industry Report, 2013-2016

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Abstracts

The sportswear mainly consists of sports footwear, sports apparel and accessories. USA, China, Japan and Brazil are the four largest sportswear markets around the globe, with revenue sharing more than half of globe's total.

Since 2012, in addition to the increasingly challenging macro-economic and retail environment in China, the sportswear industry continued to be overcrowded with intensified competition and high inventory, and the focus for retailers is still on clearing inventory and improving profitability.

Under the background, the enterprises have to reduce the inventories and relieve the dilemma through shutting up shops, industrial promotion and channel transformation. According to incomplete statistics, in H1 2013, Lining, Anta, Peak, China Dongxiang and Xtep totally closed over 2000 stores.

In H1 2013, the revenue and net income of 6 local major listed sports brands all witnessed negative growth. Anta features the highest revenue (RMB3366.5 million) and the smallest year-on-year decline rate (14.43%). China Dongxiang characterizes the lowest revenue (RMB563.0 million) and biggest decline rate (32.30%).

Lining behaves the worst. During 2012-H1 2013, Lining was in a loss state. In H1 2013, the company suffered loss of RMB184.2 million. Since capacity expansion was faster than demand growth, China's traditional sportswear market entered a structural adjustment period in 2012. It is predicted that the sportswear industry in China will still encounter the oversupply, shrinking demand and challenges on offline channels from online channels in future several years, and the integration of whole industry will last at least 2-3 years.

China Sportswear Industry Report, 2013-2016 mainly consists of the followings:

20120114.gif Development of sportswear industry in China: changes of enterprises' profitability and number of stores;

20120114.gif Revenue of sportswear industry in China, and revenue, marketing channels, etc. of three segment markets (Footwear, Apparel and Accessories);

20120114.gif Competition pattern of sportswear market in China: brand awareness, market competition pattern and regional competition;

20120114.gif Analysis on 3 major international sportswear enterprises as Nike, Adidas and Puma, including operation, revenue structure, gross margin, number of stores and development in China;

20120114.gif Analysis on 9 major sportswear brand enterprises in China (Lining, Anta, 361 Degrees, Xtep, Peak, China Dongxiang, Hongxing Erke, Qiaodan Sports and GRN), including operation, revenue structure, gross margin, number of stores, sales mode, development strategy and performance prediction in future 3 years.

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