

# Camping & Outdoor Gear



February 2009    US\$395

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# CAMPING & OUTDOOR GEAR

## Supplier capability in China

### EXECUTIVE SUMMARY

China's camping and outdoor gear industry is bracing itself for a difficult year as demand contracts amid the financial crisis that has hit the US and spread over to other markets.

Customs statistics already reflect a softening in external demand, with exports falling off the growth track in 2008. The volume of products sent overseas dropped 3 percent, after having increased more than 10 percent a year before. In contrast, export sales rose 20 percent to break the \$3 billion mark, buoyed by the higher value of each unit shipped abroad.

At many companies, a marked slowdown began during the last quarter of 2008. External demand is expected to weaken further in coming months as consumers in the industry's two largest markets continue to cut back on discretionary spending. Other economies are also expected to feel the full impact of the financial crunch, which may weaken exports further.

With the market for camping and outdoor gear contracting, competition is projected to intensify and may lead to a price war. This is a major concern for suppliers in China, since most cannot afford to cut quotes without risking financial viability. While the cost of some materials has declined, other expenses have gone up and kept total manufacturing outlay high.

Amid this business climate, most companies will be shifting resources to focus more on the midrange segment. This is primarily because the low end has become unattractive due to its slim margins, while demand for upscale models has waned because of the financial crisis and the resulting economic slowdown.

In line with the focus on the midrange market, the following are some of the key trends we see in China's camping and outdoor gear industry:

- Manufacturers will be spending more for new product development. At

many companies, efforts will be focused on portable designs that can make camping and related outdoor activities more convenient and enjoyable.

- Releases are also expected to reflect increased ecological awareness, with suppliers employing durable materials that contain lower levels of heavy metal and other substances harmful to the environment. For portable lighting products and other electrical devices, more-efficient batteries and other components that can provide greater energy savings will be employed.

- Export destinations will become more diversified. Although North America and the EU will remain key markets, areas outside of these two regions will grow in importance as suppliers expand their client base to mitigate business risk.

The report covers the major types of camping and outdoor gear produced in China. In the Products & Prices section, these are classified into nine product categories, namely tents, sleeping materials, cooking equipment, picnicware, lights, optics, knives and other tools, compasses and fishing equipment. Detailed descriptions of the different types offered in each line and their key price determinants are provided.

The Industry Overview discusses issues affecting production and exports, and the strategies suppliers are implementing in the face of these challenges. In addition, this section describes the composition of the supplier base and identifies key manufacturing centers for each category.

To reflect the current industry structure, more than 50 percent of the companies in this report are based in Zhejiang province, China's top exporter in terms of volume and value. More than 40 percent of the country's shipments in the products identified come from this hub.

### In this report

- 17 in-depth company profiles
- 15 additional suppliers
- 55 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

### METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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Published by Publishers Representatives Limited (on behalf of Trade Media Limited)  
P.O. Box 219 GT, Strathvale House, North Church Street, George Town, Grand Cayman, Cayman Islands  
c/o 22/F Vita Tower, 29 Wong Chuk Hang Road, Aberdeen, Hong Kong

ISBN 978-988-8004-49-2

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## INDUSTRY OVERVIEW

China's camping and outdoor gear industry is bracing itself for a tough year, with expectations that external demand will generally weaken amid the financial crisis that has hit the US and spilled over to the EU. The two areas remain the sector's largest markets, accounting for more than 50 percent of exports in terms of value.

Suppliers focusing on the two markets already noted a slowdown starting in 2008, with sales falling short of targets and many small makers folding up. Even companies that do not focus on the US and the eurozone are lamenting about decelerating export growth, as the full effects of the financial crunch spill over to other areas. Several also identify the growing strength of the yuan relative to other currencies in Asia, Eastern Europe and Africa as a major reason, as this development has hurt their price advantage in those regions.

Statistics attest to weaker exports, with several product lines showing a drop in volume. Overall, shipments in 2008 dropped by 3 percent after posting an increase of more than 15 percent the year before. Nonetheless, total revenue from overseas shipments remained on a growth track, rising 20 percent to exceed \$3 billion. These contrasting trends in volume and revenue are due primarily to the surge in per-unit value, a consequence of suppliers having raised their quotes or moved upmarket to cover higher production costs.

Exports of certain categories decelerated at a faster pace, particularly during the last quarter of 2008. In these lines, shipments during the three-month period showed a slowdown or outright decline that was much larger compared with the whole camping and outdoor gear industry.

Shipments of fishing rods, reels and lures between October and December, for instance, fell 17 percent to 234 million units. Per-unit value rose more than 30 percent, however, bringing

revenue up by 10 percent to exceed \$190 million.

Meanwhile, exports of the three lines for the entire year dropped 21 percent to 1 billion pieces after having grown 11 percent in 2007. Revenue went up by 12 percent to \$813 million, with per-unit value having increased more than 30 percent.

In the sleeping bags sector, shipments during the three-month period ending December 2008 fell 23 percent to just over 7 million units. This is a significant drop, considering that exports grew 20 percent during the same period in 2007. Per-unit value rose, however, bringing revenue up to \$55 million, only 2 percent lower compared with the same quarter of the previous year.

Strong sales during the earlier months kept the line's overall sales growth in 2008 positive despite shipment volume dropping 7 percent. Exports were valued at \$280 million, 7 percent higher compared with data for the previous 12-month period. Nonetheless, comparison of year-on-year growth show a slower pace of increase, with the surge in 2007 recorded at 12 percent.

In the pocketknife sector, export volume during the last quarter of 2008 dropped 13 percent to 32 million units after rising at the same pace in the last quarter of 2007. Revenue, on the other hand, reflected an increase of 6 percent to \$15 million, with per-unit value having gone up 22 percent.

Pocketknife exports in 2008 showed only a slight drop of 0.3 percent to 138 million units. In terms of value, sales earlier in the year buoyed performance upward by 37 percent to reach \$62 million. Compared with 2007 figures, growth decelerated by 23 and 15 percentage points, respectively.

### Suppliers take middle road

Manufacturers and trading companies believe that the real impact of the crisis will be felt in these next 10 months

### Supplier summary

Suppliers surveyed	17
Export sales	\$77.5mn
Export ratio	72%
OEM business	64%
Capacity utilized	64%
Annual R&D spending	\$3.1mn
Full-time employees	5,182

Data: All surveyed suppliers

after the Chinese New Year, which is typically when 80 to 90 percent of the revenue comes in.

Many are concerned that with the large number of suppliers vying for market share, competition may intensify to the point of a price war. Despite the declining cost of certain raw materials, primarily petroleum-based types, most businesses cannot afford major reductions in quotes because higher testing fees and labor costs keep total manufacturing outlay high and margins slim. In the next few months, several have indicated they will drop prices only if raw material costs continue downward.

To sustain export growth and financial viability during this difficult period, most companies are expanding into or strengthening their position in the midrange segment. Competing primarily in the low end, the industry's traditional market, is now impractical because margins have become so slim as to be nearly nonexistent due to higher manufacturing outlay. On the other hand, targeting the high end is risky at present, since consumers worldwide are tightening discretionary spending amid the financial crunch.

In line with this measure, manufacturers will be investing more in widening their product selections rather than capacity expansion. Other than the unfavorable business climate, a major reason for this is the fact that several suppliers had additional production lines installed in 2008, and most of these are now operational.

At many companies, efforts will

### Anhui Light Industries International Co. Ltd

Anhui Light is an ISO 9001:2000-certified trading company with exports ranging from houseware to marine vehicles. It sources products from 30 factories in Guangdong, Zhejiang, Anhui and Jiangsu provinces.

Total sales amounted to \$200 million in 2008, with camping and outdoor gear accounting for 3 percent. Shipments in the category consisted of tents, sleeping and cooking equipment, picnicware, lights, tools, compasses, scopes and fishing gear.

North America, the EU, Eastern Europe, the Asia-Pacific region and the

Middle East were among the products' destinations. Sixty percent of exports consisted of OEM and ODM orders, and the rest carried in-house brands.

Anhui Light allocates about \$100,000 to R&D annually. Of its 300 full-time employees, 10 are dedicated to product development and related activities. Multifunction models will be the focus of these specialists in coming months.

The company offers sample-making services. It also provides export documentation, shipping and aftersales assistance.

#### Company facts

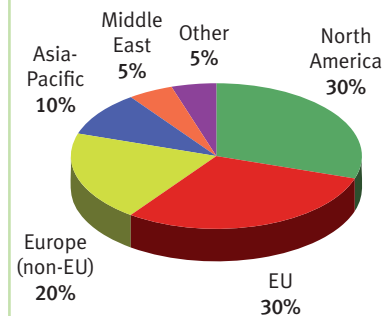
Year established	1984
Business type	Trading company
Company ownership	Mainland China-owned
Head office location	Hefei (Anhui)
No. of subcontracting factories	30
Factory location(s)	Dongguan (Guangdong), Hangzhou (Zhejiang), Hefei (Anhui), Suzhou (Jiangsu)
No. of full-time employees	300
No. of in-house R&D/design staff	10
No. of production line QC staff	60
Annual export sales (all products)	\$200.0mn
Annual R&D spending	\$100,000
ISO certification	Yes

#### Sales & output: Camping & outdoor gear

Annual export sales	\$6.3mn
Share of total export sales	3%
Average monthly exports	36,000 units
OEM % of exports	40%
ODM % of exports	20%
OBM % of exports	40%
Major customers	Tesco (UK); ALOI (US)
Other products traded	Houseware, furniture, baby and children's products, pet supplies, garments, textiles, footwear, stationery, school supplies, bags, fitness accessories, arts and crafts, electronic devices, marine crafts, buses, energy-saving products

#### Profile

##### Export markets



##### Export profile



#### Contact details

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**Capability**

**Services provided**

Sample making	Yes
Export documentation	Yes
Shipping	Yes
After sales	Yes
In-house packaging	No
In-house assembly	No
Dedicated capacity	Yes

**Exports by product**

Tents	15%
Sleeping equipment	15%
Cooking equipment	5%
Picnicware	5%
Lights	15%
Tools & knives	10%
Compasses	15%
Binoculars & optics	15%
Fishing equipment	5%

**Exports by market**

North America	30%
European Union	30%
Europe (non-EU)	20%
Asia-Pacific	10%
Middle East	5%
Other	5%

**Outlook**

- **Export prices**  
Decrease
- **Export price decrease**  
Less than 5%
- **Export sales**  
Increase 10-20%
- **Target market**  
European Union
- **Capital expenditure**  
No increase
- **Major challenge**  
Price competition
- **Export capability**  
Improve operating efficiency
- **R&D focus**  
Multiple functions

**Popular export models**



**Description:** Portable grill; 27cm diameter; 23cm cooking height

**Cooking equipment**

Model	05931A
Minimum order	500 units
Packaging type	Carton
Delivery time	35 days
Indicated price	\$21.20



**Description:** 300mm PA-coated 170t polyester; PE floor; two fiberglass poles, 6.9mm diameter; 200x110x140cm

**Tent**

Model	TE-52
Minimum order	1,000 units
Packaging type	Carton
Delivery time	30 days
Indicated price	\$5.70



**Description:** Grill; 69x38cm fire bowl; 110cm cooking height; with cooler bag

**Cooking equipment**

Model	5300
Minimum order	500 units
Packaging type	Carton
Delivery time	35 days
Indicated price	\$6.40

## PRODUCT GALLERY

### Tents & sleeping equipment



**Anhui Light**  
(profile page 34)  
**Model:** TE-52  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** \$5.70  
**Description:** Tent; 300mm PA-coated 170t polyester; PE floor; two fiberglass poles, 6.9mm diameter



**Camp Planner**  
(profile page 36)  
**Model:** 2006113  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 40 days  
**Indicated price:** •  
**Description:** Hammock; canvas; steel frame, 45mm diameter; 325x122x120cm



**East Grace**  
(profile page 38)  
**Model:** EGE-030  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** •  
**Description:** Tent; 190t polyester taffeta flysheet; 190t polyester walls; 150d oxford floor; FRP poles, 7.9mm diameter; (70+210)x180x120cm



**East Grace**  
(profile page 38)  
**Model:** EGJ-SM3018  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** •  
**Description:** Sleeping bag; 170t polyester shell; 200gsm polyester filling; 230x80x50cm



**East Grace**  
(profile page 38)  
**Model:** EGK-DSCF0080  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** •  
**Description:** Sleeping mat; 120gsm acrylic top; 80gsm polyester filling; 600d oxford bottom; 150x180cm



**Hangzhou Shunxin**  
(profile page 40)  
**Model:** HFA800  
**Minimum order:** 100 units  
**Packaging type:** Colored box  
**Delivery time:** 45 days  
**Indicated price:** \$8.95  
**Description:** Air bed; flocked PVC top, 0.52mm-thick; PVC bottom, 0.32mm-thick; two valves; with repair kit; 38x32x8cm gift box

• Information not disclosed

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