

# Sports Equipment



September 2009 US\$395

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# SPORTS EQUIPMENT

## Supplier capability in China

### EXECUTIVE SUMMARY

China's sports equipment industry is adopting a cautious stance for the rest of 2009 through 2010. While anticipating that business will improve as economic conditions get better, suppliers are actively stimulating demand to boost sales and reduce risk. Many are also taking this opportunity to veer away from price competition and enhance long-term competitiveness.

China customs statistics for the first half of 2009 show total exports down 37 percent year on year. Revenue also fell, by more than 25 percent, as many suppliers maintained or scaled back prices to attract orders. While there were companies that did raise their quotes, most kept adjustments minimal.

Some categories, however, remained on a growth track. Rackets were among the gainers, with shipment volume rising 4 percent and value, 5 percent.

Exports of golf equipment were the worst hit during the first half of 2009, with revenue and volume falling 21 and 19 percent, respectively. The line remained a major export category, however, accounting for over 20 percent of sales.

In coming months, expecting raw material costs to be relatively stable, a number of companies will maintain the quotes of existing models to encourage repeat and additional orders. In line with this strategy, several are investing in advanced machinery to streamline operations, cut labor costs and reduce losses from production wastage and defects. Many are also reducing promotional expenses.

The following are some of the other key developments we see in China's sports equipment industry:

- Product differentiation will increase as suppliers try to gain better margins. Efforts to innovate are also in line with plans to boost market recognition of in-house brands.

- At most companies, R&D endeavors will revolve around the creation of more user-friendly designs. Enhanced visual appeal, durability and functionality are also expected from new releases.

- Additionally, many are responding to heightened safety and environmental concerns, especially those backed by product standards in major markets. Those targeting the US, for instance, are opting for phthalate-free materials to comply with the Consumer Product Safety Improvement Act of 2008.

- Export sales are expected to grow at double-digit rates in coming months as pricing and differentiation strategies, accompanied by economic recovery, stimulate demand.

The report covers the major types of sporting goods exported from China, namely golf equipment, rackets, skates and skateboards, sports balls, winter and water sports equipment, inflatable boats and protective gear.

Each product category has its own section that provides details on the common features and price determinants of major product lines. The latest trends in terms of design and materials are also discussed.

A description of the supplier base can be found in each segment. Key characteristics of small, midsize and large suppliers are highlighted.

The Industry Overview illustrates the effects of the global economic slowdown on the industry. It also identifies the strategies that are being employed at most companies to stimulate demand and boost revenue.

To reflect the industry structure, more than 70 percent of the suppliers interviewed for this report are based in the provinces of Guangdong, Zhejiang and Jiangsu. These hubs, together with Fujian province, account for nearly 80 percent of China's revenue from overseas shipments of sports equipment.

### In this report

- 22 in-depth company profiles
- 26 additional suppliers
- 77 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 companies participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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## INDUSTRY OVERVIEW

China sports equipment suppliers are generally upbeat about business conditions for the months ahead, with many projecting double-digit growth in exports as the economy recovers and upcoming sports events such as the 2009 China Open and the 2010 Asian Games stimulate market interest. Nonetheless, companies remain cautious, since demand is still weak compared with pre-crisis levels.

In the first half of 2009, aggregate shipment volume fell 37 percent year on year. As many suppliers maintained or cut product prices to encourage orders, total export sales slumped 27 percent to \$2 billion. This is a far cry from the same period in 2008, when the line saw growth of 56 and 48 percent, respectively.

Some categories, however, demonstrated a strong resilience against the weak global economy. Outbound shipments of rackets, for instance, increased 4 percent to exceed 36 million pieces, while revenue from the line grew 5 percent to \$125.2 million.

In the skates and skateboards sector, suppliers saw export sales go down 2 percent, but the number of products sent abroad rose 4 percent to nearly 26 million pieces. The decline in value was largely due to the 6 percent drop in average per-unit prices.

Shipments of water sports equipment from January to June were also better than expected, slipping only 3 percent to 66 million units. With the average product value having gone down 5 percent, however, overall revenue fell 8 percent to \$120.6 million.

The worst hit by global financial challenges during the period was the golf equipment sector, which saw export sales and volume drop 21 and 19 percent. With about \$428 million worth sent abroad, the line made up more than 20 percent of the country's sales from shipments of sporting goods, which pulled down overall revenue and volume.

Despite being hit hard by the

financial crisis, North America and the EU remained the top importers of China-made sporting goods. Sports participation in these areas remained relatively high compared with other markets, fueling demand.

Between January and June, \$889.5 million worth of products were sent to North America. In the past three years, the region has generated more than 40 percent of overseas sales.

Meanwhile, the EU took in over \$507 million worth during the period. Since 2006, more than one-fifth of export revenue has come from this market.

The Asia-Pacific region, in particular the developed economies of Japan, South Korea and Australia, also remained key destinations. Overall, exports to the area exceeded \$192 million.

### Strategic pricing, differentiation

In coming months, finding the strategy effective for the first half, many companies will be maintaining the prices of their existing models to encourage orders.

Aiding suppliers in their goal is the relative stability of raw material costs. And although spending for metal, plastic and other compounds are expected to rise in the months ahead, most are anticipating that increases will be slight. Consequently, a number intend to absorb the added expense as a means of encouraging product uptake.

For a tighter rein on operating costs, suppliers are improving management systems and reducing losses from production wastage and defects. Several makers of soccer balls, for instance, are minimizing the defect rate by employing heat sealing instead of handstitching to bond panels together. Among providers of inflatable boats, some are shifting from handcrafted to machine-made hulls to cut labor costs and increase output.

In terms of promotion, a number of companies are opting for online

### Supplier summary

Suppliers surveyed	22
Export sales	\$68.2mn
Export ratio	87%
OEM business	74%
Capacity utilized	67%
Annual R&D spending	\$9.9mn
Full-time employees	11,285

Data: All surveyed suppliers

advertisements instead of trade shows, since the latter can be more expensive.

To reduce the impact of price competition and gain better margins, suppliers are stepping up efforts to release differentiated models that will allow them to charge a premium. At several manufacturers, launching innovative designs is also in line with plans to strengthen their brand image and raise overall competitiveness for the long term, particularly in the domestic market.

For most companies, enhancing user friendliness is the key R&D thrust. Depending on the product, advanced materials or processes are being employed to achieve this objective. Several enterprises are also making structural adjustments.

In skates, Coolmax is increasingly being incorporated as lining for greater comfort. Besides being breathable, the fabric has moisture-wicking, deodorizing and anti-bacterial properties.

Among makers of water sports equipment, those producing wetsuits are employing blind stitching and gluing to produce watertight models. Elastic panels are also being fitted on the sides, knees and elbows of several designs for greater flexibility.

Some versions have Lycra-trimmed wrists and ankles, and adjustable neck seals. Molded rubber pads are also gaining ground, as they provide better shin and knee protection.

The latest snorkels are offered with one-way tubes curved to better fit the sides of the head. For swimming goggles and diving masks, releases

### China Wangli Group Co. Ltd

ISO 9001:2000-certified China Wangli has one manufacturing arm for sports equipment. The subsidiary, Yongkang Wangli Hardware Mfg Co. Ltd, is dedicated to the production of skateboards. Running at nearly 64 percent of capacity, it can turn out 32,000 pieces each month, with the molds also made in-house.

The company's entire output in the line is exported. Ninety percent are OEM orders and the rest are under ODM agreements.

North America is the main market, absorbing 60 percent of shipments.

Europe has a 30 percent share, while South America and Africa together account for 10 percent.

Last year, exports of skateboards were valued at \$6 million. With the EU as the target market, revenue is expected to increase between 10 and 20 percent in the months ahead.

Skateboards generate 12 percent of China Wangli's total sales. The bulk comes from ATVs and electric scooters.

Overall, the company operates five factories with a combined area of 300,000sqm and a workforce of 2,000.

#### Company facts

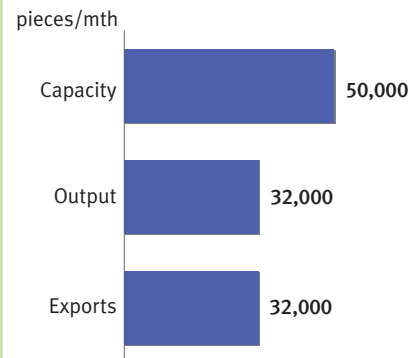
Year established	1997
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Jinhua (Zhejiang)
Number of factories	5
Factory location(s)	Jinhua (Zhejiang)
Total factory area	300,000sqm
No. of full-time employees	2,000
No. of R&D/design staff	80
No. of QC staff	170
Annual sales (all products)	\$50.0mn
Annual R&D spending	\$2.0mn
ISO certification	Yes

#### Sales & output: Sports equipment

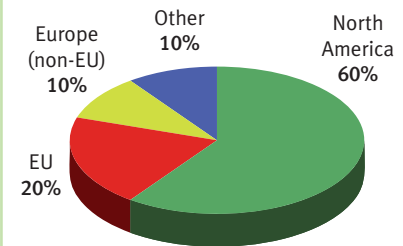
Annual sales	\$6.0mn
Share of total sales	12%
Annual export sales	\$6.0mn
Total monthly capacity	50,000 pieces
Average monthly output	32,000 pieces
Capacity utilized	64%
Average monthly exports	32,000 pieces
Export ratio	100%
OEM % of exports	90%
ODM % of exports	10%
OBM % of exports	—
Other products made	ATVs, electric scooters

#### Profile

##### Production



##### Export markets



#### Contact details

##### Business contact

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Capability

Production checklist

Makes molds in-house	Yes
Bladder-processing machines	—
Vulcanizing machines	—
Laminating machines	—
Plastic-injection machines	—
Heat-sealing machines	—
Cutting machines	—
Sewing machines	—
In-house surface treatment	Yes
Official league certification	No

Exports by product

Golf equipment	—
Rackets	—
Skates & skateboards	100%
Sports balls	—
Winter sports equipment	—
Water sports & diving equipment	—
Inflatable boats	—
Protective gear	—
Other sports equipment	—

Exports by market

North America	60%
European Union	20%
Europe (non-EU)	10%
Asia-Pacific	—
Middle East	—
Other	10%

Survey

- **Export prices**  
Increased
- **Export price increase**  
5-10%
- **Export sales**  
Increase 10-20%
- **Target market**  
European Union
- **Capital expenditure**  
No increase
- **Major challenge**  
Stricter overseas standards
- **Export capability**  
Widen product range
- **R&D focus**  
Environment-friendly materials

Popular export models



Skateboard

Model	WL-SD002
MOQ	2000 pieces
Packaging	Carton
Delivery	15 days
Price	•

Description: Caster board; ABS deck; PU wheels; 83x23.5x11cm; 2.9kg



Skateboard

Model	WL-SD007
MOQ	2,000 pieces
Packaging	Carton
Delivery	15 days
Price	•

Description: Caster board; aluminum alloy deck; PU wheels; 79x23.5x11cm; 3.1kg



Skateboard

Model	WL-SD012
MOQ	2,000 pieces
Packaging	Carton
Delivery	15 days
Price	•

Description: Caster board; steel deck; PU wheels; 79x23.5x11cm; 3.38kg

• Information not disclosed

## PRODUCT GALLERY

### Sports balls



**Anhui Light**  
(profile page 36)  
**Model:** No. 4  
**MOQ:** 10,000 pieces  
**Packaging:** Polybag  
**Delivery:** 25 days  
**Price:** \$0.70  
**Description:** Football; rubber bladder; size 4; other sizes available



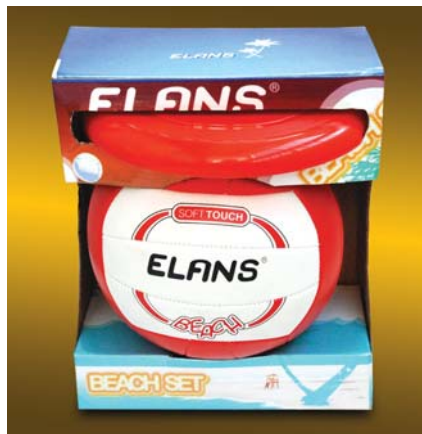
**Anhui Light**  
(profile page 36)  
**Model:** No. 5  
**MOQ:** 10,000 pieces  
**Packaging:** Polybag  
**Delivery:** 25 days  
**Price:** \$0.85  
**Description:** Football; rubber; size 5; other sizes available



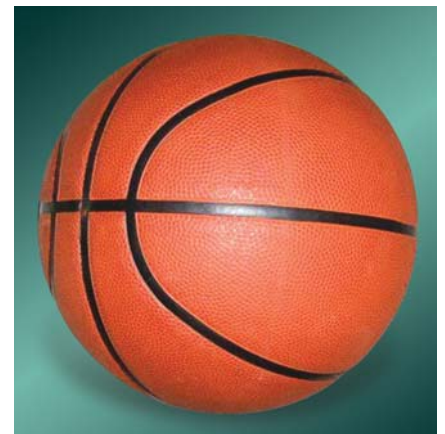
**Cheer Great**  
(profile page 38)  
**Model:** FB-09100  
**MOQ:** 5,000 pieces  
**Packaging:** OPP bag, carton  
**Delivery:** 15 to 20 days  
**Price:** •  
**Description:** Soccer ball; PVC or PU cover; machine-stitched or handsewn; sizes 1 to 5



**Cheer Great**  
(profile page 38)  
**Model:** FB-09103  
**MOQ:** 5,000 pieces  
**Packaging:** OPP bag, carton  
**Delivery:** 15 to 20 days  
**Price:** •  
**Description:** Soccer ball; PVC or PU cover; machine-stitched or handsewn; sizes 1 to 5



**Elans**  
(profile page 44)  
**Model:** VBS657  
**MOQ:** 1,000 sets  
**Packaging:** Color box  
**Delivery:** 20 days  
**Price:** \$2.50  
**Description:** Volleyball and frisbee set; PVC volleyball; rubber bladder; size 5; PP frisbee



**Nantong Sanxing**  
(profile page 48)  
**Model:** B1  
**MOQ:** 3,000 pieces  
**Packaging:** Polybag, color box  
**Delivery:** 20 days  
**Price:** •  
**Description:** Basketball; foam rubber; sizes 1 to 7

• Information not disclosed

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