EU MARKET SURVEY 2001

SPORTS AND CAMPING GOODS

VOLUME II

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2001

SPORTS AND CAMPING GOODS

Compiled for CBI by:

Searce

in collaboration with
P. Korver

September 2001

New CBI publication with new format and contents partly replacing CBI market survey “Sports and camping goods” (October 1998).

Photo courtesy:

Searce

CONTENTS

REPORT SUMMARY

This survey profiles the EU market for sports and camping goods, which includes all hardware articles used for active sports, snow sports, water sports, fishing, camping and outdoor activities. It emphasises those articles which are relevant to exporters from developing countries, and highlights six selected markets within the EU. The survey provides information on consumption, production, imports/ exports, trade structure and prices and margins.
The appendices at the end of the survey include contact details of importers, trade associations and other relevant organisations.

As an exporter, you need this information to formulate your own marketing or product strategies. To assist you in taking the right decisions and to become familiar with how to assess the right sales channel, CBI has developed a matching EU Strategic Marketing Guide "Sports and camping goods" (2001). This practical handbook is made for exporters from developing countries, who wish to expand or break into the EU market and gives practical information on quality standards and on how to deal with prospective buyers or partners. It also provides a methodology of analysis and ready-to-fill-in frameworks, which can be completed using much of the information provided in this EU Market Survey.

This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read the survey and filled in the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that has already been compiled and published) and primary data (information that you collect yourself).
An example of secondary data is this EU Market Survey. Primary data are needed when secondary data are not sufficient for your needs as, for example, when you are researching which type of consumer will be interested in your specific product.
Some useful sources of information are (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, along with shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you collected your information, you should analyse the information. In order to judge the attractiveness of the market or sales channel, you should develop a classification or score system.
For more detailed information on market research reference is made to CBI's Export Planner (2000).

Sports participation
The selected countries in this survey are the Germany, France, United Kingdom, Italy, Spain and The Netherlands, which are the largest EU consumers of sports and camping goods. The consumption is closely related to participation in various kinds of sports. Overall, in 1999 around 50% of people in the selected EU countries participated in some form of sporting activity.
The traditional forms of sport (e.g. swimming and football) still have the largest numbers of participants. Popular sports such as tennis, squash and many of the team sports have declined in popularity in the 1990s. Fitness has been popular in all northern EU countries, while in southern EU countries, martial arts and outdoor activities (trekking and climbing) are favoured in order to keep fit.

Consumption
The EU is the second largest market for sports and camping goods in the world following the USA.
In 1999, the 376 million consumers of the 15 member states spent around US$ 10,296 million at retail prices. With the existence of many different kinds of sports, the EU market for sports goods is more fragmented than the other world markets. In 1999, Germany and France accounted each for one quarter of total EU consumption, followed in importance by the United Kingdom (11%), Spain (11%) Italy (6%) and The Netherlands (5%). Due to the recession in the early 1990s, purchases of sports equipment were often postponed by consumers. In addition, sports lost ground to other leisure activities growing fast in popularity (e.g. home computers, consumer electronics).
Most retail outlets increasingly stocked sportswear (clothing and footwear) and drastically reduced their assortments of sports equipment.

From 1996 onwards, a slow recovery was underway in most EU countries. Between 1995 and 1999, EU consumption increased by 9%, from US$ 9,412 million to US$ 10,296 million, as a result from the following trends:

- ***Increased participation in sports by women and older people (especially in fitness).***
- ***A growing desire to go 'back to nature' (outdoor activities).***
- ***More consumer interest in their health and appearance.***
- ***A growing popularity of 'fashionable' individual sports (e.g. sliding sports, golf, beach and street sports).***

Fishing tackle is not included in the sports goods market, although it is an important leisure activity with an estimated 12 million participants in the selected EU countries. In 1999, EU retail sales of fishing tackle valued US$ 1,836 million, where France, United Kingdom and Italy were the major markets.

Production
Germany is the largest EU producer of sporting goods followed by Italy, France and the United Kingdom. The overall supply of sports goods in the EU is still dominated by Nike, Adidas and Reebok and here US suppliers are gaining importance.
In 1999, the total sales value of the major suppliers of sports and camping goods (including sports clothing and footwear) in the EU was estimated to be around US$ 10 billion.
Production of the wide range of specialised sports equipment is controlled by 1,300 smaller manufacturers throughout the EU. Germany and the United Kingdom use a large share of their production for supplying the domestic market, whereas France and Italy are more sizeable exporters. Manufacturers in most EU countries now contract much of their production to lower cost factories in Asia or Eastern Europe.

Distribution
Sports specialist shops dominate the retail distribution of sports goods in the EU, accounting in most selected markets for around 60%. Significant *chain stores* (e.g. Décathlon), who have a large share in the domestic market, have actively expanded their operations in other EU markets. As a result of the success of chain stores, the market share of independent, non-organised sports shops has been drastically reduced, forcing many of them to join larger organisations or *buying groups* (Intersport or Sport 2000), become *franchisees* or close down. Chain stores and specialised stores connected to a buying group are prevalent in middle and northern EU countries, while smaller specialists shops are typical in Italy and Spain.
Mail order has increased its market share of sports goods in most countries, which is now gradually shifting to *e-commerce. Single brand stores* and *factory outlets,* which are stores from suppliers, selling the complete article range of one particular brand, grow in importance in all selected countries.

Imports
Most sports and camping goods are made in China and other Asian countries (e.g. Taiwan, Pakistan and Thailand). Since the early 1990s, these countries have expanded their exports to the EU very rapidly.
The huge investments in technical and design expertise from EU manufacturers and better communication have stimulated this expansion. In addition, most Asian countries were able to benefit from the devaluation of their currencies relative to those in Europe (especially the UK Pound), which resulted in lower prices for EU importers. In 1999, one third of all EU imported sports and camping goods came from China and this level is expected to increase in next few years.

The EU is among the leading importers of sports and camping goods in the world and, in 1999, accounted for 586 thousand tonnes with a value of US$ 3,651 million. Total EU imports increased by 17% in volume and decreased by 4% in value, indicating falling values for EU imports, resulting from lower prices of articles, which was also due to an oversupply of in-line skates and skis in the EU market.

Main EU importers
Germany is the largest EU importer, accounting for 20% of total EU imports: 135 thousand tonnes, with a value of US$ 718 million, in 1999. Germany is followed by the United Kingdom (18% of EU imports in 1999) and France (17%). In terms of volume, all countries in the EU increased their imports of sports goods between 1997 and 1999, especially those of equipment for fitness, golf, watersports and camping goods.

Main supplying countries
Around 62% of EU imports came from non-EU sources. Apart from China and Taiwan, other large non-EU suppliers to the EU include USA (golf), Pakistan (balls), Thailand (watersports), Canada (outdoor sports), Japan (golf) and Czech Republic (skates).
The leading supplier within the EU were Italy (fitness, watersports and in-line skates), followed in significance by France (mainly camping goods, skis and fishing tackle), Germany (fitness, outdoor sports and camping goods), Austria (snowsports equipment) and the United Kingdom (golf, footballs).

Developing countries
The share from developing countries in the total value of EU imports of sports goods was around 39% in 1999. The volume of imports from developing countries rose by 18% from 270 to 319 thousand tonnes, valued at US$ 1,505 million in 1999.
Between 1997 and 1999, the EU imported more equipment for fitness, watersports, golf, balls, skates and camping goods from developing countries.
The largest increases were in the supplies from China, while less was imported from significant supplying countries like Pakistan, Thailand, South Korea and India. Other developing countries like Malaysia, Slovenia, Vietnam, Sri Lanka, Philippines, Tunisia, Mexico and South Africa increased their supplies to the EU.

Exports
In 1999, the EU exported 307 thousand tonnes with a value of US$ 3,084 million. Significant exporters of

sports goods include France and Italy, reflecting their international leadership role in sports goods and sportswear. Between 1997 and 1999, EU exports increased by 15% in volume and decreased by 1% in value. This volume increase was mainly due to higher exports by all of the selected EU countries, especially France, United Kingdom and The Netherlands.

Opportunities for exporters in developing countries
For 2000, a growth of 2% in EU retail sales, reaching a value of US$ 10,537, is expected, with an increased sales of sports goods to women and children. On the other hand, the EU sports market growth will be restrained by a decreasing confidence in economy, where consumers are expected to spend more carefully in 2001. Nevertheless, in-home fitness equipment (e.g. weights, mats, a-b toners, rollers and trimmers) and equipment for outdoor activities, golf, sliding sports (e.g. skateboarding), horseriding, water and diving sports will be growing segments in which exporters may find the following opportunities:

- ***Equipment and accessories*** for these popular sporting activities. For exporters, who have no brand recognition, the lower to medium price range market segment may offer good opportunities.
- ***Subcontracting:*** some EU manufacturers/suppliers look for new low-cost countries to outsource production of high volume items, while others look for exclusive items to meet the increasing diversity in demand in their country. Here, inputs in terms of design and material are often made by the EU company.

Threats and difficulties for exporters:
- The sports article should be well finished, exactly made according to importers' specifications, and meet the quality requirements of the demanding EU market, where strict safety standards are often required.
- Production capacity, keen pricing and fast delivery are needed to establish reliable relationships with importers or other buyers. Good communication (e-mail and personal contact) and flexibility are vital.
- 'Zapping sports', i.e. people changing from sports to sports regularly, makes it difficult to start a long-term investment based on the current market situation.

1 PRODUCT CHARACTERISTICS

1.1 Product groups

The products covered in this survey are hardware articles used for active sports (individual and team sports), snow sports, water sports, fishing, camping and outdoor activities (e.g. trekking, climbing).
Also considered are larger items of equipment usually bought by institutions (e.g. sports schools), such as fitness equipment, although many of the figures available only show sales to consumers.

All these hardware articles fall into the sector *sports equipment* within the sports goods market, where the following product groups can be identified:

Definition of sports participation
According to the COMPASS project, undertaken by eight EU sports federations, which has created a platform for monitoring sports participation in EU countries, sports is defined as follows:

> ***'Sports' means all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels.***

Sports		Products groups
Fitness/gym	–	exercise bikes, treadmills, steppers, elliptical trainers, free weights, dumbbells;
Racket sports	–	tennis, badminton and squash rackets;
Table tennis	–	bats, balls, nets, tables;
Balls	–	leather/non-leather, inflatable/non-inflatable; tennis, football, hockey, cricket, volleyball, basketball etc.;
Outdoor sports	–	equipment and accessories for athletics and other field sports;
Team sports	–	hockey sticks, equipment for baseball, basketball, volleyball, rugby, cricket, polo etc;
Skates	–	ice skates, roller skates, in-line skates, skateboards, kickboards, wakeboards, carveboards;
Golf	–	clubs, balls, accessories, carriage (trolley, carts and bags);
Snowsports	–	skis, bindings, boots and accessories;
Watersports	–	sailboards, waterskis, surfboards, diving, snorkelling, spectacles, swimming caps etc.;
Camping goods	–	tents, airbeds, mattresses, sleeping bags, camping accessories, climbing equipment, other equipment for recreational outdoor activities (cooking gear, lanterns etc.);
Fishing tackle	–	rods, hooks, reels, nets;

With regard to *outdoor sports*, it should be noted that this refers to all equipment for athletics and other field sports. Equipment for recreational *outdoor activities* like hiking or climbing equipment are not included in this category, but in the *camping goods* group.

Bicycles, motorbikes, cars, motor boats, sailing boats, yachts, caravans, campers, sports bags, sports clothing and sports footwear are not covered in this survey.
In some cases reference is made in the sections 3.2 (country markets), 4 and 7.1 to *sports clothing* and *sports footwear,* which have been two fast growing sectors of the sports goods market in the 1990s.
Since sportswear has been increasingly used as leisurewear by consumers, more sports specialist stores in all EU countries have put the emphasis on sports clothing and footwear, which has been at the expense of the sales of sports equipment.

Detailed information on sports clothing and can be found in the Market Survey 'Outerwear', whereas information on sports footwear is given in the Market Survey 'Footwear'.

This broad definition can be interpreted in different ways. In this survey the lists of sports or activities which are considered to be important in each country are contained within the following major categories:

Individual activities	e.g. golf, racket sports, skiing, athletics, darts, pétanque, martial arts, gliding sports. Fitness activities e.g. aerobics, dancing, fitness, weight, working out, running, jogging, yoga.
Team sports	e.g. football, cricket, rugby, basketball, hockey, volleyball, handball, cricket.
Watersports	e.g. swimming, surfing, waterskiing, scuba diving, snorkelling, canoeing, rowing.
Outdoor activities	e.g. hiking (more than 3 km), rambling, climbing, horse riding, fishing.

In France the term ***gliding sports*** *('sports de glisse')* is often used and refers to various kinds of new sensational sliding activities, popular among younger people. These activities can be done:

- ***On snow,*** for example snowboarding, carving, parabolic skiing.
- ***On water,*** for example waterskiing, rafting.
- ***On the street,*** for example in-line skating, skateboarding, kickboarding, carveboarding.
- ***In the air,*** for example delta flying, parachute jumping or paragliding.

In other countries, most of these activities are often referred to as *extreme sports*.

1.2 Customs/statistical product classification

The classification system used for both Customs and statistical purposes in EU member countries is the Harmonised Commodity Description and Coding System (HS), which is used worldwide.

Table 1.1 gives a list of the main HS codes for sports and camping goods. Distinctions are made here according to the raw material used in their manufacture. The more detailed HS code groups for sports goods covered in this survey are given in Appendix 1.
The major groups are given below:

HS Code	Product group
9506	**Sports equipment**
95061	Snowsports
95062	Watersports
95063	Golf
95064	Table tennis
95065	Rackets
95066	Balls (all types)
95067	Skates
950691	Fitness/gym
950699	Outdoor sports/Team sports
6306	**Camping goods** (including equipment for outdoor activities)
63062	Tents
63064	Airbeds
630699	Miscellaneous camping goods
94043	Sleeping bags
9507	**Fishing tackle** (rods, hooks and reels)

Source: Eurostat (2001)

2 INTRODUCTION TO THE EU MARKET

European Union
The European Union (EU) is the current name for the former European Community. Since January 1, 1995 the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of whom already have extensive trade and co-operation agreements with the EU.
It is envisaged that five of these countries will become members in 2003.

In 1999, the EU population totalled 376 million and the average GDP per capita amounted to US$ 22,767.

The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in EU countries. As unification allows free movement of capital, goods, services and people, the internal borders have been removed and goods produced or imported into one member state can be moved around between the other member states without restrictions.
A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the EU is already a fact, regulations in member countries have not yet been harmonised. Work is in progress to create EU regulations in the fields of environmental pollution, health, safety, quality and education.

Euro (€) and ECU
On January 1, 1999, the Euro (€) became the legal currency within 11 EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Their national currencies are now subdivisions of the Euro but will continue to circulate as legal tender until 2002.

Circulation of Euro coins and banknotes will begin on January 1, 2002 and these will gradually replace national currency notes and coins, which must be withdrawn by July 1, 2002. At present, banking is possible in both the Euro (€) and national currency.

Currencies used in this EU market survey
The most recent Eurostat trade statistics quoted in this survey are from the year 1999. In previous years, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On January 1, 1999, statistical and contractual values in ECU were converted into Euros on a 1:1 exchange rate.
In 1999, the €/US$ exchange rate was US$ 1.06 for one €, which is used in all statistics in this market survey. However in 2000 and 2001, the value of the Euro fell to an average exchange rate of US$ 0.90 for one €.

In this market survey, the US$ is the basic currency unit used to indicate value. In trade statistics given in Appendix 2, the values for dates after January 1, 1999 are also expressed in €.

Exchange rates of EU currencies in US$

Country	Currency	1995	1996	1997	1998	1999	2000	2001 (Sept.)
European Union	ECU / €	1.29	1.25	1.13	1.12	1.06	0.96	0.90
Austria	Ash	0.099	0.094	0.082	0.081	0.072	0.07	0.067
Belgium/Luxemb.	Bfr	0.034	0.032	0.028	0.028	0.025	0.024	0.022
Denmark	Dkr	0.18	0.17	0.15	0.15	0.14	0.13	0.12
France	Ffr	0.20	0.20	0.17	0.17	0.15	0.15	0.14
Finland	FM	0.23	0.22	0.19	0.19	0.17	0.16	0.15
Germany	DM	0.70	0.66	0.58	0.57	0.51	0.49	0.47
Greece	GRD	0.0043	0.0041	0.0036	0.0034	0.0031	0.0029	0.0028
Ireland	I£	1.6	1.6	1.52	1.42	1.26	1.22	1.20
Italy	L	0.00061	0.00065	0.00059	0.00058	0.00051	0.0005	0.00048
Netherlands	NLG	0.62	0.59	0.51	0.51	0.45	0.44	0.42
Portugal	Esc	0.0067	0.0065	0.0057	0.0056	0.0049	0.0048	0.0046
Spain	Ptas	0.008	0.0079	0.0068	0.0067	0.006	0.0058	0.0055
Sweden	Skr	0.14	0.15	0.13	0.13	0.12	0.12	0.10
United Kingdom	GB£	1.57	1.56	1.64	1.66	1.61	1.58	1.51

Source: CBS Statline (2001)

Trade statistics

Trade statistic quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on January 1, 1993. Until that date, trade was registered by means of compulsory customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case.

Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

EU Market Survey

This survey profiles the EU market for “Sports and camping goods” in which six selected markets within the EU are highlighted. The countries selected for this survey are the Germany, France, United Kingdom, Italy, Spain and The Netherlands, which are the largest consumers of sports goods in the European Union.

In 1999, they accounted for around 80% of total EU purchases of sports goods, with Germany and France both taking a large share of 25% each. The United Kingdom is the largest consumer of golf and fitness equipment, while France and Italy, sets worldwide trends in snow sports and racket sports. Developing countries supplied 42% of total sports and camping goods imports (in value terms) to these six countries.

All six selected countries within the EU have a fast growing number people who are active in sports.

Here, the emphasis in sports participation will be less on the competitive team sports and more on leisure and individual sports. With more leisure time, people are likely to exercise or undertake outdoor activities in order to stay fit, considering the ageing process of the population. By the year 2020, the proportion of 45+ olds in most countries is expected to be more than 40% of their total population. Besides outdoor activities, fitness and golf are continuing to gain in popularity as well.

Spain is a particularly fast-growing market for all kinds sports and camping goods, which may offer opportunities for exporters from developing countries, especially those with which it has colonial links and existing trade, such as Latin America and The Philippines.

3 CONSUMPTION

3.1 Sports participation

The consumption of sports equipment is closely related to participation in various kinds of sports, which can be done in competitive, individual or recreational form. Overall, in 1999 around 50% of people in the selected EU countries participated in some form of sporting activity. This included *regular* (more than once a month) and *occasional* (at least 3 times per year) participation, and represented around 160 million people. According to the Deutscher Sport Bund, in the same year around 70 million people (or 18% of the EU population) were member of at least one of the 600,000 sports clubs within the selected EU countries. Participation rates in France and United Kingdom were high (i.e. around 70%) and both countries had relatively many regular sporters (50% or more). The Netherlands and Scandinavian countries (Sweden and Finland) had relatively many regular sporters as well, however, the total participation in these countries was around 65% or lower. The least physical active people were found in southern Europe, particularly in Italy as is shown in figure 3.1.

Figure 3.1 Sports participation in the major EU countries in 1999
Regular and occasional participants in number and percent of population

High participation more than 70%		**Average participation between 60% and 70%**		**Low participation less than 60%**	
France		**Netherlands**		**Spain**	
40 million	72%	9 million	67%	15 million	39%
United Kingdom		**Belgium**		**Italy**	
33 million	70%	6 million	65%	20 million	35%
		Germany			
		50 million	60%		
		Denmark			
		3 million	62%		

Source: TSIF, FPS, Nielsen, SCP, CSD, BIOC (2000)

Major sports undertaken in selected EU countries
The traditional forms of sport still have the largest numbers of participants in most EU countries, with swimming and football being most popular in the selected EU countries, as is shown in table 3.1.

Popular sports such as tennis, squash and many of the team sports have declined in popularity in the 1990s, where many of the team sports have suffered from a shift from competitive towards the more individual sports and recreational activities. People find these activities more comfortable and less demanding in terms of efforts and time.

The number of women participating in sports has increased rapidly in all countries, doing fitness activities like aerobic, dance, steps and yoga, while weightlifting and working out became popular activities for men. Fitness has been popular in all northern EU countries and is increasingly recognised by young (and older) people. Next to fitness, in southern EU countries, martial arts and outdoor activities (trekking, orienting and climbing) are favoured in order to keep fit.

Future sports in the EU
According to a survey done by SRE (Sports Retail Europe) Magazine among 4,000 sports goods retailers throughout Europe in 2001, snowsports was regarded as sports with the best growth potential, as shown in table 3.2

Team sports are recently stimulated to young people, who tend to stop participation after leaving school. Modern sports centres are built, where different kinds of team sports can be played and here the emphasis in games is more on creating a team spirit than on exercise.

'Zapping sports' has been a trend among French young people and seems to be apparent in other EU countries as well. Here, people start playing sports impulsively and then stop or change to other sports or other leisure activities, such as video games, computer etc.

Table 3.2 Sports with the best potential for growth in 2000 - 2001

	Share
Snowsports (skiing, snowboarding)	18%
Skateboarding (scooters, wakeboards)	12%
Football	12%
Outdoor activities	11%
Fitness	10%
Golf	9%
Running / jogging	8%
Tennis	2%
Beach sports (e.g. volleyball)	2%
Inline skating	2%
Badminton	1%

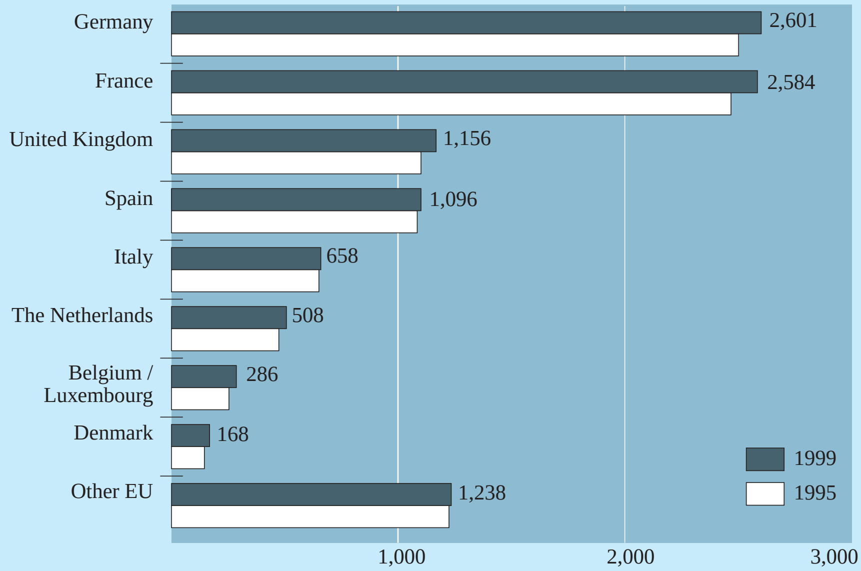
Source: SRE, Messe München (2001)

Table 3.1 Most important sports in the selected EU markets in 1999

Country	Sports
Germany	Swimming, football, jogging, fitness/aerobics, outdoor activities, skiing, in-line skating, tennis.
France	Outdoor activities, football, skiing, fitness, watersports, jogging, tennis, martial arts, rugby.
United Kingdom	Swimming, football, fitness, snooker, darts, golf, jogging, bowls, outdoor activities, badminton.
Italy	Football, swimming, skiing, tennis, fitness, outdoor activities, volleyball, basketball, fishing.
Spain	Football, swimming, basketball, jogging, fitness, tennis, outdoor activities, skiing, martial arts.
The Netherlands	Football, swimming, fitness, tennis, jogging, (in-line) skating, outdoor activities, watersports.

Source: TSIF, BBE Data Kompakt, FPS, Sita Nielsen, SCP (2001)

Figure 3.2 EU retail sales of sports and camping goods, 1995 - 1999 Value in US$ million



NOTE: Consumption of fishing tackle is not included.

Source: FPS, Mintel, Sports Panel, Sita Nielsen, VDS, HBD (2001)

3.2 Market size

European Union
The EU is the second largest market for sports and camping goods in the world following the USA. In 1999, the 376 million consumers of the 15 member states spent around US$ 10,296 million at retail prices, while US expenditure in that year amounted to US$ 17,344 million. With the existence of many different kinds of sports, the EU market for sports goods is more fragmented than the other world markets. Between 1995 and 1999, EU consumption increased by 9%, from US$ 9,412 million to US$ 10,296 million and consumption by country is shown above.

Fishing tackle is not included in the sports goods market, although it is an important leisure activity with an estimated 12 million participants in the selected EU countries. In 1999, EU retail sales of fishing tackle valued US$ 1,836 million, where France, United Kingdom and Italy were the major markets. A breakdown by country and by product can be found at the end of the next section 3.3.

EU market growth 1990 - 1999
The sports market in Spain has grown steadily as a result of more coverage of sports on national channels, which has influenced participation positively. In other selected EU countries, there was little growth in consumer sales of sports goods, which was mainly due to the economic recession during the early 1990s.

Purchases of sports equipment were often postponed and markets tended to be saturated. Most retail outlets increasingly stocked sportswear (clothing and footwear) and reduced their assortments of sports equipment.

In addition, sports lost ground to other leisure activities growing fast in popularity like those for home computers, consumer electronics, cars, health and tourism.
From 1996 onwards, a slow recovery was underway in most EU countries. The main reasons were:

- Increased participation in sports by women and older people, especially fitness and outdoor activities.
- More consumer interest in their well-being, health and appearance.
- A higher consumer confidence in economic growth and in the future beyond the millennium.
- Increased participation in ‘fashionable’ individual sports (in-line skating, golf, beach and street sports).

In 1999, Germany and France accounted each for one quarter of total EU consumption, followed in importance by the United Kingdom (11%), Spain (11%) Italy (6%) and The Netherlands (5%).

The average consumption per capita on sports and camping goods in EU countries in 1999 was US$ 27. People in France, Germany and The Netherlands spend a higher percentage of their income on sports and camping goods than those in Italy and the United Kingdom.

Germany

Germany is the largest EU market for sports and camping goods. In 1999, according to VDS (German Sports Goods Federation), German retail sales was US$ 2,601 million (25% of the EU market).
In the same year, German households spent US$ 32 per capita on sports and camping goods, which is slightly higher than the EU average. As is shown in figure 3.3 sales of sports goods between 1995 and 1999 has risen by 4%. Compared to the consumption of sportswear, which has increased dramatically in the past few years, sports and camping goods accounted in 1999 for 33% of the total sports market.

There are clear regional differences in participation, partly due to sports culture, but more strongly to disposable income. The former East Germans are unable to spend as much money on sports and leisure activities as their West German cousins and do more swimming, athletics and table tennis. In 1999, about 50 million people or 60% of the German population participated in sports. Of these, around 25 million people were members of one of the 87,000 sports clubs.

Especially the popularity of in-line skating in the late 1990s, gave a tremendous boost to the mature German market and accounted for 8% of retail sales of sports goods. In 2000, however, demand for in-line skates, as well as for tennis and squash rackets, has fallen. In 1999, fitness equipment accounted for 12% of German sports goods market and this figure is expected to increase, especially for in-home fitness equipment.

Figure 3.3 **German consumption of sports and camping goods**
Value in US$ **1995 - 2000**

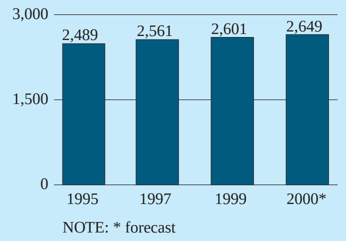
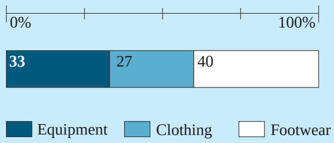


Figure 3.4 **Comparison sports goods and sportswear**
As percent of total sales value **1999**



Source: VDSI, Sport 2000 (2001)

France

France is the second largest market for sports and camping goods in the EU, closely following Germany. In 1999, the value of total French consumption was US$ 2,584 million, or 25% of the EU market.
Compared to other EU markets, French households are the biggest spenders on sports and camping goods, with a per capita expenditure of US$ 44 in 1999.

As is shown in figure 3.5 sales of sports goods between 1995 and 1999 has risen by 5%. Compared to the consumption of sportswear, sports and camping goods (i.e. sports equipment) accounted in 1999 for 34% of the total sports market. As the country offers mountains, coasts and a favourable climate, French people enjoy many outdoor and camping activities.

In 1999, around 72% of the French population (around 40 million people), took part in at least one sport of which 9.4 million were member of 115,815 sports clubs. The popularity of outdoor activities, fitness, in-line skating, snowboarding, gliding/board activities *(sports de glisses)*, golf and horse riding have stimulated the French market in the late 1990s.

Sales of tennis and ski equipment has declined, partly caused by parallel imports of cheap skis and rackets. Young French people tend to switch from sport to sport faster nowadays *('le zapping sportive')*.
French consumers look for product performance, quality, innovations and are concerned about the manufacturing of the product.

Figure 3.5 **French consumption of sports and camping goods**
Value in US$ **1995 - 2000**

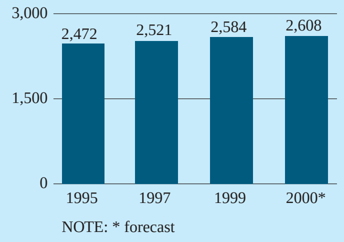
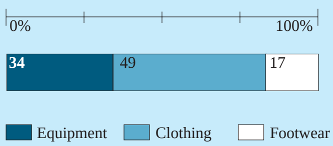


Figure 3.6 **Comparison sports goods and sportswear**
As percent of total sales value **1999**



Source: FPS, SGMA (2001)

United Kingdom

In 1999, the value of total consumption was US$ 1,156 million, or 11% of the EU market for sports and camping goods. As is shown in figure 3.7 sales of sports goods between 1995 and 1999 has risen by 7%. Compared to the consumption of sportswear, sports and camping goods (i.e. sports equipment) accounted in 1999 for 18% of the total sports market and is a highly fragmented market, since there are many different kinds of sports in the UK. In 1999, golf and fitness equipment together accounted for half of the UK market, as is shown in figure 3.8.

With regards to sports participation, in 1999, 70% of adults engaged in at least one sporting activity. Nowadays almost as many women as men participate in sport, although two times as many men as women participated in competitive sports. Cue sports, swimming, football, golf, weight training and running were the most popular sports for men. Women tend to favour more individual activities like aerobics/keep fit, yoga, swimming and weight training. There is a long-term movement away from competitive sports and team sports, towards individual sports. In-home fitness equipment (e.g. weights, mats, a-b toners and trimmers) and golf equipment are fast growing segments. Major growth in the future must be sought in technical innovations in equipment and material and in the introduction of new sports, some of which last only for a short time.

Figure 3.7 UK consumption of sports and camping goods
Value in US$ 1995 - 2000

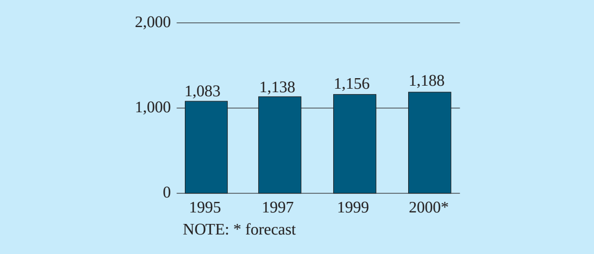
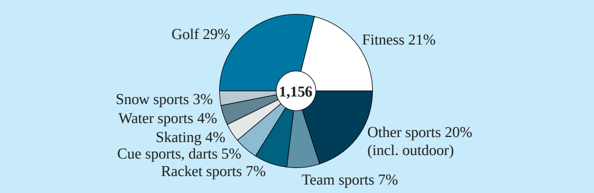


Figure 3.8 UK sports goods consumption by equipment
Value in US$ 1999



Source: Mintel, Keynote, Taylor Nelson (2001)

Spain

Along with the economic growth and the popularity of fitness, outdoor and golf, the Spanish market for sports and camping goods has grown fast. Foreign sports chain stores, especially from France established outlets throughout the country and between 1995 and 1999, retail sales increased significantly by 77% (from US$ 620 to 1,096 million), as is shown in figure 3.9. Compared to the consumption of sportswear, sports and camping goods (i.e. sports equipment) accounted in 1999 for 35% of the total sports market. Participation by Spanish people in sports is low, compared to other EU countries. The average level of activity is lower in poorer South Western part, compared to the urbanised regions of the country or the Balearic Islands, where more people do a sports or any other form of exercise. In 1999, around 15 million people, or 39% of the population, were engaged in sports. Football is the absolute no.1 in Spain. Fitness, golf, tennis, outdoor activities, snow, street and watersports are becoming increasingly popular in Spain.

As is shown in figure 3.10, balls, rackets and ski equipment were the largest single segments. The category 'sports accessories' formed a large part (28%) as a result of increased sales of videos (for fitness), rucksacks (for outdoor), wristguards (for in-line skating) and increased sales of other sports related articles (eyewear, sports watches).

There is a growing interest in fitness, golf and outdoor activities (camping, trekking), watersports (surfing, diving) and snowsports (carving, snowboarding).

Figure 3.9 Spanish consumption of sports and camping goods
Value in US$ 1995 - 2000

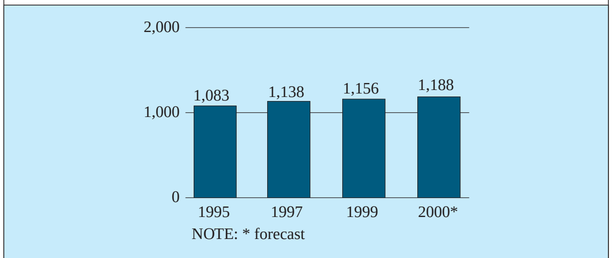
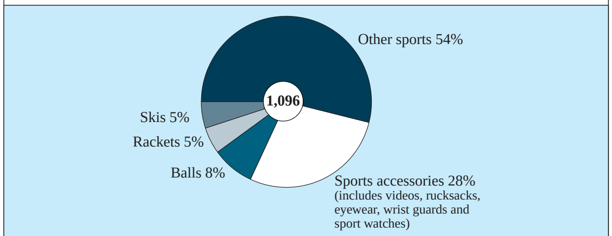


Figure 3.10 Spanish sports goods consumption by equipment
Value in US$ 1999



Source: Sports Panel, AFYDAD (2001)

Italy

Italy is a large market for sportswear, but a relatively small market for sports and camping goods. Compared to the consumption of sportswear, sports equipment accounted, in 1999, for only 13% of the total sports market, as is shown in figure 3.12. In the same year, the value of total Italian consumption was US$ 658 million, or 6% of the EU market. Compared to other EU markets, Italian households are the lowest spenders on sports and camping goods, with a per capita expenditure of US$ 11 in 1999.

As is shown in figure 3.11 sales of sports goods between 1995 and 1999 has been more or less static. In 1999, around 20 million people, or 35% of the population, were engaged in some sports. The average level of activity is lower in poorer southern part, compared to the wealthier northern regions of the country. Popular sports include watersports (swimming, diving, surfing), skiing, athletics, jogging and horseriding. Ski equipment was the largest single segment and was estimated to account for 25% of total sports equipment sales, followed by rackets (14%).

Sales of both rackets and skis have declined drastically in the last few years, which was strongly affected by the popularity of new fashionable sports e.g. in-line skating, snowboarding, carving, golf, horseriding and climbing.

Most of these sports they can do in their own country. When it comes to buying equipment, many Italian people are conscious about brands and prefer equipment featuring the latest technological innovations, which must look ‘professional’.

Figure 3.11 **Italian consumption of sports and camping goods**
Value in US$ **1995 - 2000**

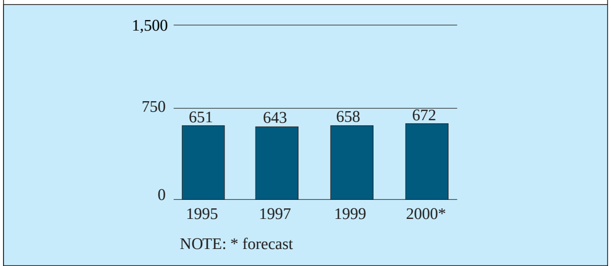
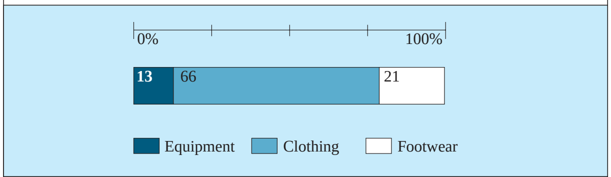


Figure 3.12 **Comparison sports goods and sportswear**
As percent of total sales value **1999**



Source: Sita Nielsen (2001)

The Netherlands

The Netherlands is the sixth largest market for sports and camping goods in the EU, despite its size compared to other countries. In 1999, the value of total consumption was US$ 508 million, or 5% of the EU market.
The consumption per capita of US$ 32 is well above the EU average. As is shown in figure 3.13 sales of sports goods between 1995 and 1999 has risen by 7%. The popularity of fitness, in-line skating, outdoor activities, golf and horse riding gave a boost to the mature Dutch equipment market in the 1990s, although from the year 2000 the sale of in-line skate market declined. In addition, tennis has been popular, after a period of decline.

Between 1980 and 1999, the number of Dutch people participating in sports increased from 59% to 67%, which was mainly due to more sports activities by women and older people. In 1999, the total number of participants was around 9 million, of which 4.7 million were members of the 30,000 sports clubs.

People play many kinds of sports varying from the more *‘established sports’* (e.g. football, tennis and watersports) to *‘adventurous sports’* (trekking, climbing, rafting, diving) or the more sensational *‘extreme sports’* (kickboarding, bodysurfing, martial arts). In general, Dutch people want to keep up with the latest thrills, many of which come from the USA.
When it comes to buying sports equipment, they concern about product quality, innovations, product performance or design – and they often compare prices.

Figure 3.13 **Dutch consumption of sports and camping goods**
Value in US$ **1995 - 2000**

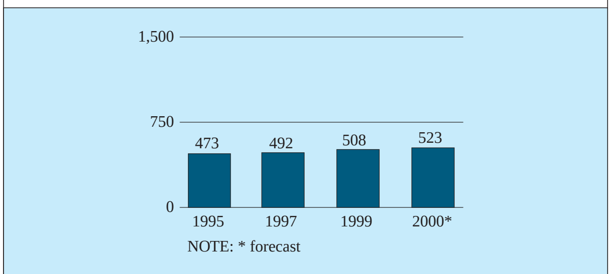
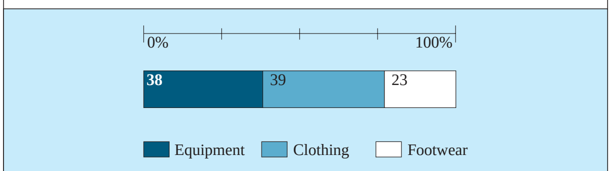


Figure 3.14 **Comparsion sports goods and sportswear**
As percent of total sales value **1999**



Source: HBD,CBS (2001)

3.3 Market segmentation

The main focus of this section will be on the most important sports and its products. Detailed information on sales of sports equipment in all selected countries is difficult to find. Therefore an EU overview of each sports in terms of major trends, participants, brands are described. In order to have an idea of the development and shares of sports equipment within each field of sports, the sales in one sample country will be given. Here it should be noted that there are differences between the selected countries.

Fitness/gym

In the early 1990s, fitness rapidly increased in popularity, partly because of its modern, fashionable image and partly because it can be undertaken at times to suit the participant.

In 1999, younger women were the main participants in aerobics, dancing, keep fit exercise, steps and yoga. Major activities by men are weight training, working out and jogging/running.

There has been a tremendous increase in the number of participants in all mentioned fitness activities in the 40+ age group. Those who participate in fitness activities on a regular (weekly) basis do so in fitness centres and clubs. Since there is a growing number of frequent participants, becoming more educated and enthusiastic, there is increasing demand for fitness and training equipment for in-home use. The in-home fitness market in the United Kingdom reached in 1999 a total value of US$ 166 million as is shown below. It should be noted that videos, books, and multigyms, used in fitness clubs, are excluded here.

Exercise bikes and free weights together accounted for around 70% of the UK in-home fitness market.

Free weights is a fast growing segment of the in-home fitness market, mainly because of an increased demand from women, who believe that long-term slimming seems more likely to be achieved by the regular use of dumbbells. The category 'other equipment' includes stomach exercisers such as AB Toners, rollers, rowing machines, exercise mats and resistance equipment (small wrist, hand, thigh exercisers and chest expanders). These portable items are relatively cheap and are often impulsively purchased by those with specific health or weight worries. The supply side for in-home fitness equipment is fragmented and market leaders for larger items are Kettler and Aicon with both selling under different brand names.

Racket sports

Tennis is popular among single people, young couples and people aged over 50. In 1999, the total number of people who played tennis in the selected EU countries was an estimated 20 million.

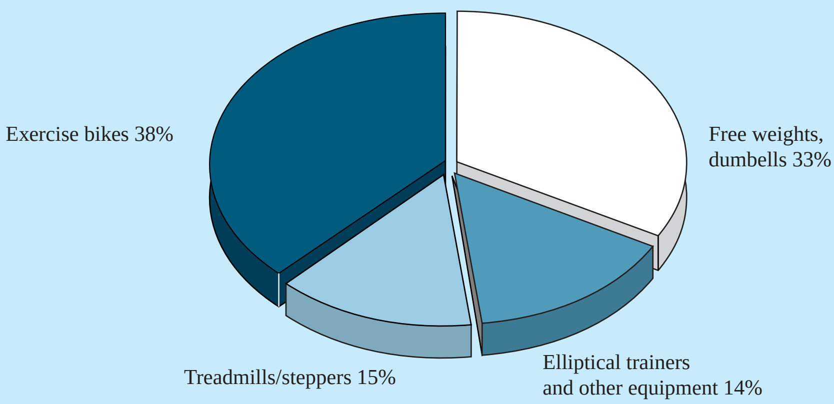
In most countries, women account for around 40% of all tennis players. Recently the number of younger players has decreased and negative factors in playing tennis and in the sale of equipment include:

- The average player is keener on recreative than on competitive tennis.
- Because tennis has become such a popular ordinary sport, many players are moving on towards more exclusive elite sports like golf.
- Technological developments and stronger material have improved the quality of rackets enormously and the changes are less frequent, so that people replace rackets less often.
- The market is very competitive because of an oversupply and parallel imports.

Between 1995 and 1999, the German tennis racket market, for example, decreased by 45% to 300,000

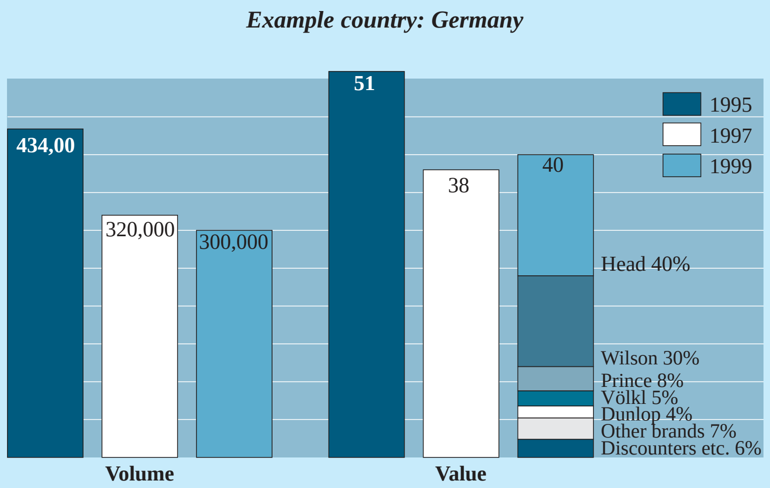
Figure 3.15 UK in-home fitness equipment market by product, 1999
As percent of total sales value (= US$ 166 million)

Example country: United Kingdom



Source: Mintel Marketing Intelligence (2000)

Figure 3.16 Development of the German tennis racket market, 1995 - 1999
Volume in pieces and value in US$ million



Source: Sports tracking Europe (2000)

pieces with a value of US$ 40 million, as is shown in figure 3.16, which also shows the major brands.

Tennis balls are often made by racket companies, who produce their own brand of balls, with Dunlop and Slazenger accounting for roughly 70% of total EU sales. In 1999, the sale of balls in Germany was estimated to be around US$ 49 million, representing a total volume of 12 million pieces. As rackets have got longer, the size of balls has increased (by 6%), with the new 'Rally' balls of Wilson and Penn.

Squash became immensely popular throughout the 1980s and into the 1990s. Regarded as a fitness activity, it was played almost exclusively by men. By the late 1990s popularity declined and in Germany and the United Kingdom many squash clubs have been converted into fitness centres. The main brands of squash rackets include DSG, Wilson, Prince, Gray-Nicolls and Head. Dunlop is the main brand for squash balls.

Badminton, which was frequently played by younger couples, has also lost in popularity. However, new impulses came from increased participation by children (under 11 years old) and beach badminton. The main brands in badminton rackets include Dunlop, Slazenger, Wilson, Carlton, Yonex and Prince.

Table tennis is most popular in former East Germany and had almost 6 million participants in Germany in 1999. The decline in popularity over the years has resulted in decreasing sales of table tennis bats.
The introduction of a larger ball with a slower spin, made rallies longer and table tennis both more attractive to spectators and easier for people to play. Well-known brands are Sunflex, Stiga and Joola.

Team sports
Following a decade of decline, football, rugby, hockey and basketball have gained in popularity since the early 1990s. Inflatable balls is the largest segment in the team sports equipment market, which has reached a total value in 1999 of US$ 81 million in the United Kingdom, as is shown in figure 3.17.

Football is strongly influenced by the enormous media coverage it receives and during or before high-profile football matches the sales of replica kits, footballs, gadgets and other sales promotion articles for fans increase enormously. Football is the most important team sport and in 1999 there were an estimated 120,000 clubs in the selected countries with a total number of 16,500,000 members. Around half of the regular players are under 25 years old, while occasional football players are mostly aged between 25 and 45.

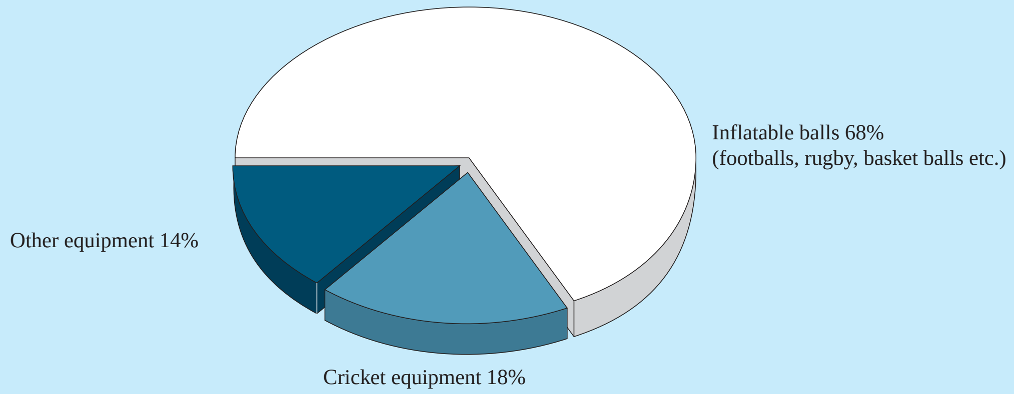
Major brands of footballs are Derbystar, Mitre, Nike, Umbro, Patrick, Adidas, Puma and Hummel. The use of child labour in the production of leather footballs in Pakistan, which supplies 80% of all footballs in the world, however, is now an important issue.

Rugby is among the most popular sports watched on television in the United Kingdom. There were around 3,250 clubs (Rugby Union) in the UK with 284,000 members. In France, rugby has grown in popularity, with 277,015 members and 1,747 rugby clubs. Rugby balls are mainly sold by Mitre, Spalding and Adidas.

Other inflatable balls are those used for basketball and American football. The number of people playing basketball have increased, especially in those playing 'street' basketball, which is popular among young

Figure 3.17 UK team sports equipment market by product, 1999
As percent of total sales value (= US$ 81 million)

Example country: United Kingdom



Source: Mintel Marketing Intelligence (2000)

people. The main brands for balls, used in basketball and American football are Wilson, Spalding and Nike.

Volleyball (or 'netball' in the UK) is widely played by young people in school as part of their physical education. Volleyball clubs have gained members in the last few years in France and Italy. Recently beach volleyball from the USA has been popular. Well-known brands of volleyballs are Nike and Rucanor.

Cricket is mostly played in the United Kingdom. In 1999, the number of cricket players here was estimated at around 2.3 million adults and in the past few years, the market for cricket equipment has more or less stabilised at around US$ 15 million. The major brand for balls is Alfred Reader and for bats Duncan Fearnley, but Dunlop Slazenger are the market leaders across the sport as a whole.

Hockey's declining popularity is in line with the general decline in interest in organised sports. Technical developments in the material used (glass fibre, carbon, aramide fibres and advanced moulded composites instead of wood) and the more curved solid heads of hockey sticks have stimulated demand in recent years. Well-known brands are Grays, Dita, Stag and Slazenger.

Skates

Ice-skating fluctuates in popularity, depending on the media coverage, the profile of national stars and on the occurrence of natural ice. In most countries, freezing periods occur only two or three times in every ten years. However since the winters are unpredictable the same applies to the sales of ice skates. Ice skating on imitation ice (indoor tracks) is a popular sport and there are enough skating rinks, provided by local authorities, where skates are often hired. The sales of ice skates are not very significant and demand for short track skates is more important than for figure skating, dancing or distance skating.

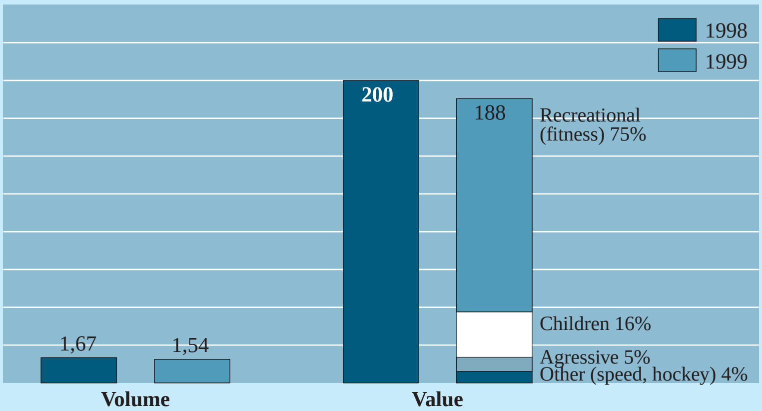
In-line skating took off in the early 1990s and inline skates sales form the largest part of the skate market. The four major selected markets had in 1999 almost 30,000,000 participants. But in the late 1990s the in-line skate craze diminished and the total skate market had fallen, especially in the United Kingdom and in Germany, the largest EU market. The German market grew constantly until 1998, when it reached a value of US$ 200 million with 1.67 million pairs sold. But by 1999 the in-line skate craze diminished and the total skate market had fallen by 7% to US$ 188 million, as is shown in figure 3.18

Three-quarters of all in-line skates were sold for recreational or 'fitness' purposes, while other buying motives were for stunt ('aggressive'), speed or hockey skating. As the trend has grown and skaters have mastered the basic skills, they are moving on to skating sports such as racing, street hockey, freestyle long distance, trail skating and stunt skating, for which specialist equipment is required.

Innovations in in-line skates are required in order to keep interest of younger skaters, who tend to be more interested in scooters and skateboards, which are the latest thrills in skating. On the other hand, adults are expected to remain positive towards in-line skating and regard it more as a permanent sporting and recreational (fitness) activity than a temporary craze. Brands for in-line skates include K2, which accounted for 50% of the German market in 1999 followed by Rollerblade

Figure 3.18 Development of the German in-line skating market, 1998 - 1999
Volume in million pieces and value in US$ million

Example country: Germany



Source: Sports Tracking Europe (2000)

(Bennetton), Salomon, Roces, Oxygen, Ultra Wheels, Tecnica, Fila, Bauer (Nike), X-Cuse, Faze 7 and Franklin Sports.

Scooters and Kickboards were the latest trend in the year 2000. Both are used for other skating related street sports, especially popular among young people. These sports are new variations on ***skateboarding,*** which has steadily grown in popularity since the late 1970s. Scooters use wheels similar to those of in-line skates. They are promoted as fashionable gadgets to different consumer groups, varying from children to office workers, who find it a useful collapsible transportation tool. Carve boarding has also become popularity, especially in France, Italy and Spain. Major brands are X-Cuse, Fishbone and Neighborhood.

Golf

The United Kingdom has the largest number of participants. Here growth in the numbers of people playing golf has been slow, with retiring players being replaced each year by new entrants. In Germany, interest in golf increased dramatically as there was more coverage by German media, communicating to the general public that ‘golf can be a sport for the normal man too’. Resulting from a growing economyin the late 1990s, golf has become popular in the other countries. Some of the selected countries (e.g. United Kingdom, Germany and France) have ‘occasional golfers’, play on a pay-per-play basis with friends or colleagues or on holiday. This group has recently grown in number, as the club infrastructure in these countries has been more open than before.

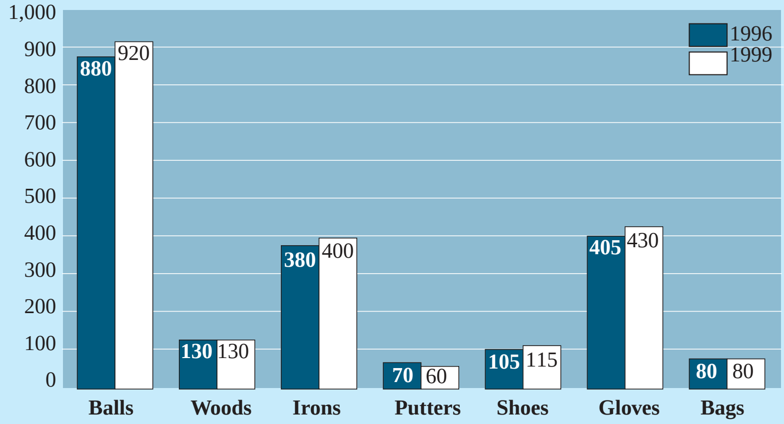
According to the PGA (professional Golfers Association of Europe), there were 2.5 million registered adult golfers in 2000, in the selected countries, playing on 4,250 golf courses. Around 70% of golfers are men, while in Germany and The Netherlands female players are relatively high. Both new technology and the introduction of new materials such as titanium are constantly improving equipment, as golfers constantly strive to improve their game and are often prepared to upgrade to new equipment. For exporters from developing countries there may be good opportunities for golf balls, bags and gloves.

Consumer spending on golf equipment in the United Kingdom amounted in 1999 to around US$ 315 million, while in Germany spending has reached a value of US$ 190 million. In the same year, consumer spending on golf equipment in France was estimated to be around US$ 145 million. In the French market, for example, golf clubs (woods, irons) and putters accounted together for 28% of the market value. Here the sales of new titanium woods have contributed to an increase of this category. In terms of volume, sales in France of balls, irons and gloves increased slightly between 1996 and 1999, as is shown in figure 3.19.

Golf equipment is sold mostly at pro shops, which are usually located on the golf courses. Other sales channels are specialised golf sport shops and increasingly at sports chain stores, department stores and even discounters such as Nevada Bob and American Golf Discount. These importers and large volume buyers have lowered the market price considerably in recent years, which has made golf equipment more affordable to a wider range of people. International US brands dominate the market and key brands are the Fortune Brands (Titleist, Footjoy, Cobra), Etonic, Callaway Golf, Taylor-Made (Adidas), Spalding, Copperidge, Maxfli, Wilson, Ping, Mizuno

Figure 3.19 Development of the French golf equipment market, 1996 - 1999
Volume in thousand pieces

Example country: France



Source: Sports Marketing Surveys (2000)

and Slazenger.

Snowsports
Skiing is most popular by French, German, Italian and Dutch people (despite the fact that there are no mountains in The Netherlands). The most popular ski resorts in the EU are Austria, France, Switzerland and Italy. Since the mid 1990s, the number of skiers has declined in most countries, mainly because people switched to other sports (e.g. outdoor activities, bicycling) and expenditure on other leisure activities (e.g. holidays to warm destinations and computer games).

The market for ski equipment has suffered from an oversupply of skis, parallel imports, price competition and winters with insufficient snow. Furthermore, ski equipment is more often bought or rented on the spot rather than being bought in the home country. By the year 2000, the sale of skis has come to a standstill and the major interest is in equipment for carving and snowboarding.

Carve skiing created a breakthrough in the saturated ski market after its introduction in 1996. The shapes and designs of these skis were inspired by the success of snowboarding. Carve skiing quickly gained popularity with a broad group of people. Carve skis are shorter in length, go faster and can take sharp curves much more easily. They have made skiing, which needed several lessons and practice, much easier and more spectacular.

Snowboarding originates from skateboarding and is also related to the popularity of surfing. It has a ‘street’ image, with its different clothing and custom image to that of traditional skiing culture.
Recently snowboarding has become well established and has been adopted by resorts and tour operators as a snow sport suitable for all ages and social types.

Watersports
Swimming, which had many registered and non-registered participants is a very popular activity in all selected countries, particularly in France, Italy, and Spain with many lakes and coasts. Like other traditional sports, swimming has also slightly suffered a reduction in popularity recently, due to an increased interest in outdoor and fitness activities.

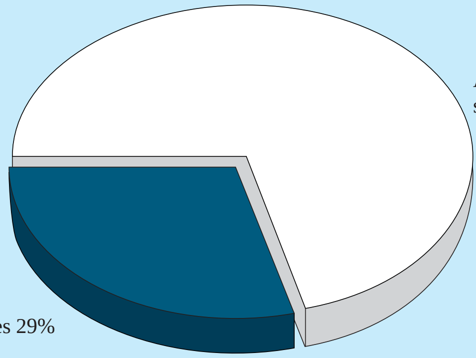
The swimming equipment market (swimming caps, headbands, spectacles, goggles) in the United Kingdom, for example, accounted for only a small proportion of the total UK swimming goods market, which was estimated to be around US$ 46 million in 1999.

The largest part of the watersports equipment market are articles for ***(scuba) diving, snorkelling, body surfing, wind surfing*** and a large variety of accessories (beach mats, bags etc.), as is shown in figure 3.20. With the fashionable beach culture, the market for swimming goods is likely to increase. Since 1995, the market for surfboards has grown along with the rising popularity of diving, snorkelling and other ‘fun’ beach activities e.g. water-ski, barfoot ski, wakeboard, hydrospeed and jet-ski. On the other hand, growth of activities will be restrained because of the water pollution at some of the coasts.

The sale of watersports equipment is not restricted to the summer, but is increasingly sold throughout the year, since younger and more affluent people tend to take frequent holidays to warm destinations in winter. For surfing sports, the variety in brands is enormous

Figure 3.20 UK watersports equipment market by product, 1999
As percent of total sales value (= US$ 46 million)

Example country: United Kingdom



Source: Mintel Marketing Intelligence (2000)

and for swimming accessories, Speedo (Pentland Group), Arena, Maru and Nike are most popular. Sales of surfboards, canoes, water-skis and skimmers are not included in the watersports equipment market, but both segments have grown recently. There is a market for cheaper quality styrofoam boards and better quality cell rubber.

Sailing has been popular for a long time in France, Italy, The Netherlands and Spain with many licenced sailers and windsurfers. As both are established activities, more sails, parts and accessories than boats or boards are sold in the equipment category.

Camping goods
(including equipment for outdoor activities)

Camping and outdoor activities are enjoyed in a natural environment and often provide an escape from the fast-paced and increasingly urbanised environment. There is an increasing desire to go 'back to nature'. Another trend is the popularity of 'survival' weekends, organised by special outdoor travel agents, companies or groups of friends, with the purpose of getting to know each other better and creating a team spirit. The number of outdoor travel agents is increasing rapidly. The most common forms of outdoor activities in the selected EU markets are:

Walking and trekking activities: *hiking* (walking 3 km or more often across country) and *rambling* (walking in low level areas, such as valleys) are undertaken by a broad range of age groups. In France, Spain and Italy these are popular family-oriented activities and the number of 'green circuits' expands rapidly. *Scrambling, fell-running* and *orienteering* are more strenuous forms of walking, mostly done in mountainous areas or along rivers, which more popular among younger people.

Climbing (rock, ice or wall climbing, bouldering) is another popular outdoor activity, especially in France, Italy and Spain. For example in France, there were in 1999, 150,000 experienced 'Alpinists' and 800,000 trainees and the country had 1,450 natural sites and several thousands of artificial climbing sites in 1999.

River sports like canoeing, kayaking and rafting are popular leisure and holiday activities by people of all selected countries.

Other adventurous outdoor activities include aerial sliding activities like delta flying, parachute jumping and paragliding. Only a small part of the population participate in these more adventurous activities, which are undertaken mainly by younger people.

Next to the growing popularity of outdoor activities, people tend to take more frequent short weekend breaks or short in-between holidays, using a tent or caravan. Both developments ensure that there is good demand for tents, camping articles and technical outdoor equipment. Sleeping bags and tents are large segments in the market for camping goods in Germany, which was estimated to be around US$ 276 million in 1999, as is shown in figure 3.21.

Within the ***tents,*** dome, geometric and hoop tents are most likely to be bought for outdoor activities, since most of these are quickly and easily assembled by a single person and can be packed in a light, compact, easy to store unit. The dome tent is most popular and continued efforts are made to improve the fabrics (e.g. Ceplex) and reduce the weight of tents.
Well-known brands for tents include Jack Wolfskin, J J Hawley, Vango, Mountain Craft, Vaude, High Colorado, Relum and Terra Nova.

Rucksacks and backpacks are another large product group worth around US$ 74 million. More variety in models, sizes, qualities and more choice in (fashionable) designs have stimulated demand.
The largest rucksacks have a capacity of 75 litres, with pockets and straps to attach accessories such as ice axes, walking aids, cooking equipment and even skis. Well-known brands are Lowe Alpine, Karrimor, Berghaus, Mountaincraft, North Face, Salewa, Lafuma, Aigle and Vaude.

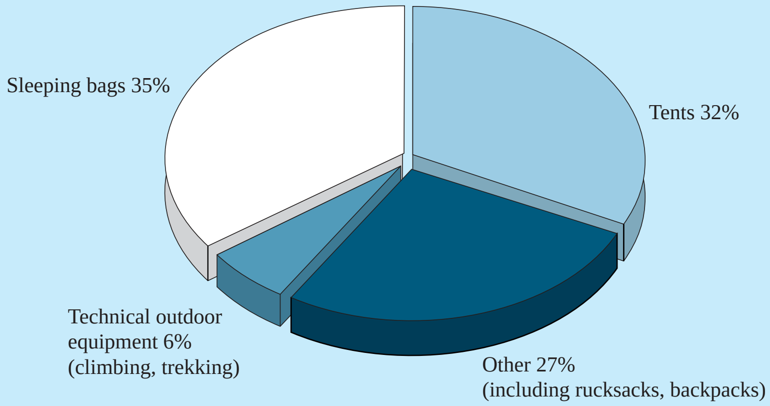
Sleeping bags sales have been stimulated by the introduction of ‘mummy’ style sleeping bags, which are lightweight, as well as being comfortable during cold and hot weather. Major brands are Vango, Mountaincraft, Hi-gear, RAB, Ajungilak and Phoenix.

Other camping goods include camping stoves (Camping gaz, Coleman Epigaz, Primus), cooking sets (Trangia, MSR, Vango), mattresses (Coleman, Karrimor, Beacon), cooking gear, lanterns, binoculars, food, mosquito nets, medical sets and other camping equipment.

Technical outdoor equipment includes all equipment used by climbers and mountaineers. Within this product group crampons, ropes/rope accessories and ice axes are the three main segments. All of these products have a highly specialised nature.

Figure 3.21 German camping goods and outdoor equipment market by product, 1999
As percent of total sales value (= US$ 276 million)

Example country: Germany



Source: SAZ Magazine (2001)

Fishing tackle

Fishing tackle is not included in the sports goods market, although it is an important leisure activity with an estimated 12 million participants in the selected EU countries. Fishing was particularly in popular in France, United Kingdom and Italy, which together accounted for two-third of EU consumption of fishing tackle, as is shown in figure 3.22.

For example, in France fishing is a popular leisure activity, which had around 2.3 million participants in 1999 of which 75% were fresh water and 25% salt-water fishermen. Most French fishers are men between 40 and 60 years old. The majority were recreational fishermen, while 25,000 people were members of one of the 1,177 fishing clubs in France.

Recently the number of participants in most selected EU countries decreased, because of:

- The growing popularity of other leisure activities (computer games, outdoor activities and the like).
- In some countries reservoirs are stocked with fish, which present little challenge to anglers.
- After the foot and mouth disease appeared in most countries in 2000/2001, it was impossible or forbidden to enter some areas for angling.

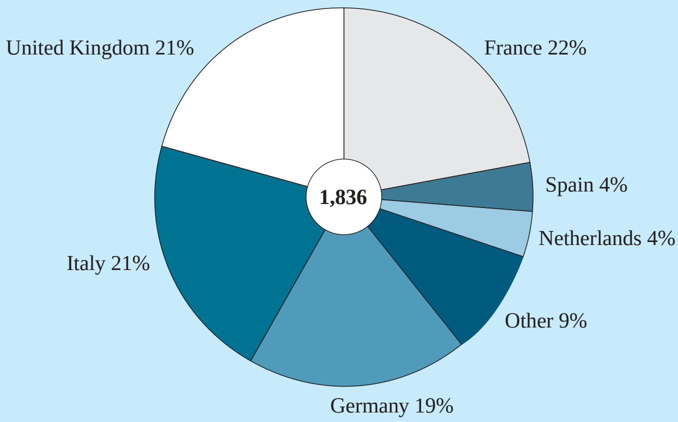
In 1999, the total expenditure on fishing tackle in France was estimated at US$ 403 million, of which rods and reels accounted for 30% of sales, hooks, nets, accessories for 30% and clothing and shoes for 40% of total expenditure. The market for rods and reels is split between well-known brands offering top quality products and the cheaper end of the market where reasonable quality at a competitive price is the consumer's main requirement. Each type of fishing tends to need its own specialised equipment.

Fishing tackle usually is mainly sold in specialised fishing tackle outlets, sports chain stores, mail order and super/hypermarkets. The oversupply of all fishing equipment became critical when it was sold by department stores, foreign discounters and foreign mail order companies, offering their articles through the Internet. All these outlets sell fishing tackle at low 'dumping' prices.

Well-known brands include Daiwa, Shimano, Zebco, VMC, Shakespeare, Abu, Silstar, Albatross, Deboissy, Garbolino, Ragot, Sert, Sundridge, Leeda and Peerless.

To stimulate sales to younger consumers, a starter pack of tackle, sold at an affordable price has been successfully introduced. Future growth of the fishing tackle market could be sought in combination with popular outdoor activities such as camping, which may result in a revival of fishing as an open-air activity, to be enjoyed in the countryside either individually or within a group.

Figure 3.22 Consumption of fishing tackle in selected EU markets, 1999
As percent of sales value in US$ million



Source: EFFTA (2000)

3.4 Consumption patterns and trends

Demand trends in the selected markets within the EU have been influenced not only by changes in sports participation, but also by changing consumer habits and the strong effects of short term crazes. Consumer expenditure on sports and camping goods is strongly influenced by the following factors:

Demography

The ageing process of the EU population will be result in an increasing number of people aged 45 years and older. They likely to be more conscious about health and may participate in fitness and outdoor activities, besides they also have the time to play sports and the available money to spend. They are an important target consumer group for the sports goods trade.

Young people are likely to spend more on sports goods and particularly fashionable sportswear. People between the ages of 35 and 50, live a busy live and have less time to spend on sports than in the past, partly due to the increasing number of households where both partners work.

Socio-economic factors and fashion

Since 1996, positive economic growth, rising employment and greater consumer confidence in most of the selected EU markets, have stimulated a new buoyancy among all consumer groups for sales of leisure goods and sports goods. In addition, fashion and design have become extremely strong influences in all durable consumer goods, being increasingly associated with different lifestyles. This tendency has been reinforced by global trends, more women participating in sports and lifestyle marketing, which have generated the elements of fashion in sports goods.

Free time

Free time is not as regular as it used to be, because of changes in working practices and house keeping.

Men play sports more frequently and for longer periods per week then women. Older age groups and unemployed people also spend more time on sports. The choice in free time activities has increased enormously over the past 10 years, and because of this, people do not want to commit themselves to sports on regular days and hours, but prefer to make more spontaneous choices.

Spectator interest

Participation is also stimulated by spectator interest it is not just youngsters who are inspired by sporting heroes. Events such as the Olympics, the World Cup, the emergence of heroes in particular sports can play a part, although there can also be negative effects, such as the failure of the national team to qualify for the finals of major competitions. This link is reinforced by sponsorship and promotional campaigns. Television is a key medium here, with football, skiing, ice skating, tennis and motorsports being popular.

Sports locations

The growing availability of sports centres in the direct neighbourhood of home or work has made it easier for people to do sports whenever they like. Sports centres have a strong social function and provide additional service (modern atmosphere, fast food restaurants, shopping facilities, children playgardens), which is another reason for individuals taking part in sport to visit the same centre regularly.

Brands

Brand awareness has been a feature of the sports goods market for a long time because clear ranking systems have always existed in the world of sport.

Moreover, the quality of the sports goods item is crucial for the performance of the sportsman as well as for his image in other sportsmen's eyes. For the young, a brand is strongly associated with the group to which they want to belong and stands for a defined personality and status level. Throughout the year, heavy promotional efforts are made by large companies such as Adidas, Nike and Reebok, in order to retain market share.

In sports equipment there are around 1,200 different brands, with each brand strongly associated to a field of sports.

Quality/price

More wealth will bring more demanding consumers who expect the best price, quality and service and will not accept the old trade-offs. They will not tolerate badly finished sports goods, which fall apart after a few months because for example of bad fittings or articles which are made of defective materials which deteriorate quickly.

In most of the selected EU countries consumers are critical and expect "value for money". In most countries, consumers are more knowledgeable because they are exposed to wider ranges of sports and camping goods sold at more retail outlets, by mail order, Internet and telesales.

Environment and child labour

Environmental friendliness has become important in the purchasing decisions made by consumers in most northern EU markets. Awareness and concern on the part of consumers is increasing and is reflected in their purchasing behaviour. Consumers are more and more reluctant to buy products if they know that non-sustainable resources are being undermined, if child labour has been used in manufacturing.

Seasonality

The annual sales of sports and camping goods can be divided into 3 peak periods, which are May/June,

August and December. Wintersports equipment is sold at the end of the year and all other sports and camping goods are sold in summer or throughout the whole year. The unreliable climate in EU countries can have a serious effect on seasonal sales of specific sporting equipment. Warm winters with little snow mean greatly reduced demand for snowsports equipment.
A cool summer reduces demand for watersports articles. Because of the growth in the number of the large sports centers, fitness centres and in the number of people playing sports at home, sports in general has become less weather sensitive then in the past.

Future trends in the sports goods market
For 2000, a growth of 2% in EU retail sales, reaching a value of US$ 10,537, is expected. In-home fitness equipment (e.g. weights, mats, a-b toners, rollers and trimmers) and equipment for outdoor activities, golf, sliding sports (e.g. skate and kickboarding), horseriding, water and diving sports are growing segments. On the other hand, growth in sales of in-line skates and rackets (squash) is likely to decline in most markets. In general, sales of sports goods rely mainly on new participants, so it is in the sports that are growing in popularity where sales of equipment are most dynamic.

According to SGI (Sporting Goods Intelligence), the EU sports goods market growth will be restrained by a decreasing confidence in economy, where consumers are expected to spend more carefully in 2001.

With a growth in new sports and leisure activities, the future market is likely to become more fragmented.

4 PRODUCTION

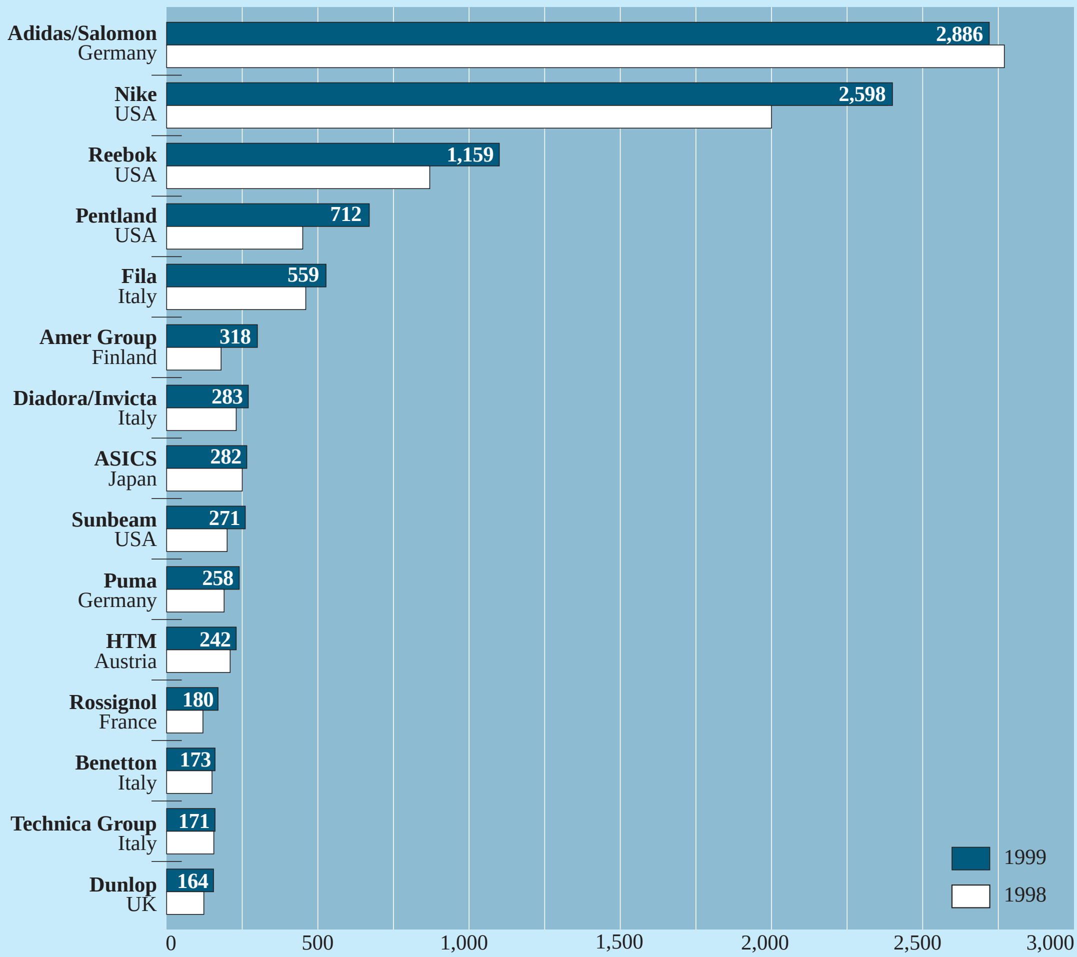
Production of sports goods
Production of the wide range of specialised sports and camping equipment, is controlled by a large number of small manufacturers in the different EU countries.

There are around 1,800 production companies in the selected countries, most of which produce specialised and high quality sports goods, as is shown below.
It should be noted that sports clothing and footwear are included here.

Production of sports goods (clothing, footwear and equipment) in the selected EU countries, 1999

	Companies	Major products and equipment by areas of sports
Germany	275	Footwear, clothing, fitness, watersports, golf and camping goods
Italy	550	Clothing, footwear, fitness, watersports, skates, skis, fishing, outdoor sports
France	110	Clothing, skis, fitness, watersports, outdoor sports and camping goods
United Kingdom	380	Clothing, footwear, golf, rackets, balls, fitness, snooker, pool, cricket, darts, fishing
Spain	451	Clothing, footwear, watersports, skis, fishing, balls and bicycles
Netherlands	45	Skates, swimwear, footwear (e.g. outdoor sandals), watersports

Figure 4.1 Major suppliers of sports goods and sportswear in Europe in 1998 and 1999
Sales value in US$ million



Largest EU manufacturers – profiles

Adidas originated in Germany and is the largest manufacturer of sports footwear in the EU. In 1998, they acquired Salomon, which strengthened their position. They are known for their three-stripe logo worldwide in the football and athletics markets. In the 1990s, sales were stimulated by the renewed popularity of football and the tendency for pop stars and rappers to wear their products. They are heavily tied up in promotional contracts with sports clubs all over the world. Nike is their main competitor. Of their total worldwide sales in 1999, sports footwear accounted for 46% and sports clothing 54%, while the remainder came from sales of sports equipment.
See also http://www.adidas.com

Nike, established in the 1970s, were originally running shoe specialists and have benefited from the growing popularity of jogging. In the 1980s, they introduced cross trainers and football shoes. The recession in Asia in 1997 left Nike with a large amounts of surplus stock in their main distribution centre in Belgium. The majority of sports goods are produced in Asia. Nowadays the Nike product range includes clothing, caps, bags, balls and other sports equipment and many accessories for different kinds of sports.
See also http://www.nike.com

Reebok, who originated in early 1900 as a British company, are now US owned. Whereas they used to be popular mainly in aerobics, they have now broadened their product ranges to cover many other sports and leisure activities, manufacturing items for running, fitness, tennis and basketball. With their multiple brand, multiple channel strategy, they now aim to reach a wide range of consumers. Their major brands include Reebok, Rockports, Greg Norman and Ralph Lauren, a well known brand in casual wear.

With Adidas, Germany is the largest producer of sportswear and sports goods in the EU, followed by Italy. Both countries are also important exporters, as are France and the United Kingdom. Germany uses a large share of its production for supplying the domestic market, whereas France and Italy are more sizeable exporters. In addition (so-called) manufacturers in many countries now contract a sizeable proportion of their production to lower cost factories in the Far East or Eastern Europe. The overall supply of sports goods and sportswear in the EU is still dominated by Nike, Adidas and Reebok.

Outsourced manufacturing

Most of the major brands are more like marketing companies than manufacturers, sourcing their products where manufacturing is either cheaper or better. Production is generally contracted out to Asian countries, where they can obtain better price and quality. Major Asian supplying countries for sportswear and for sports equipment are China, Taiwan, Vietnam, Indonesia, Thailand, South Korea and Pakistan.
As most of these countries have developed in the last few years, with rising standards of living and labour costs, there is now a tendency among suppliers to look for different countries, with cheaper production costs, especially for large volume items. In some Asian countries, the fact that factories use children as cheap labour has led some manufacturers to seek other sources of supply.

In the past few years, Eastern Europe has made significant gains at the expense of Asia, which also supplies low cost items.
Because this region is closer to the EU market, transportation costs are low and this compensates for higher material costs.
Another advantage of buying from neighbouring countries is their ability to respond quickly to faster changing market needs. The main producing countries in Eastern Europe are the Czech Republic, Poland, Slovakia, Hungary, Estonia, Romania and Slovenia. Most of these countries manufacture skis, equipment for outdoor activities, tents and bags.

Similar advantages apply to the production contracted to Southern European countries, such as Italy, Portugal and Spain. Here the more exclusive, high quality fashionable sports and camping goods are produced. Because supply lines are short, small orders can be placed and delivery made within a short period. For importers and buying groups, this is a good alternative to the inflexibility of the large brand manufacturers.

Manufacturers versus retailers

The increasingly concentrated and powerful retail sector has strengthened its position, which has had a negative impact on EU manufacturers.

Large retailers increasingly import direct from any sourcing country (i.e. parallel imports) or purchase overstocked items at very low prices in a neighbour country. Another problem for manufacturers in Germany, for example, occurred after a law, controlling agreed discounts in the sports trade, was discontinued in 2000. This led to a pricing structure in trade, which has become increasingly variable.

5 IMPORTS

Trade statistics from Eurostat are compiled from information supplied by Customs and EU companies on a voluntarily basis. Customs registers all transactions within the EU of more than US$ 106,000 (€ 100,000) as well as all transactions from non-EU sources (see also Chapter 2). This implies that within the EU there are still many unregistered transactions made by smaller companies, which are not represented in these statistics. In addition, the presence of the distribution centres of Nike, Reebok, Asics in Belgium and The Netherlands means that there are enormous volumes of sports goods, re-exported from these countries to other EU markets, so these statistics must be treated with extreme caution. With regard to *outdoor sports*, it should be noted that this refers to all equipment for athletics and other field sports.
Equipment for recreational *outdoor activities* like hiking or climbing equipment are not included in this category, but in the *camping goods* group.

The statistics specify total imports, divided into volumes/values sourced from non-EU countries (extra-EU) with the values/volumes coming from developing countries (dev.countries). Developing countries, as defined by the OECD, are listed in Appendix 10. Appendix 2 lists import statistics of the EU and the selected markets within the EU and gives detailed breakdowns of the statistics by product group and by supplying country. In these statistics the values for dates after 1 January 1999 are also expressed in €.

5.1 Total imports

Total imports by the EU
The EU is among the leading importers of sports goods in the world and, in 1999, accounted for 586 thousand tonnes with a value of US$ 3,651 million.
Total EU imports increased by 17% in volume and decreased by 4% in value, indicating falling values for EU imports, resulting from lower prices of articles.

Germany is the largest EU importer, accounting for 20% of total EU imports: 135 thousand tonnes, with a value of US$ 718 million, in 1999. Germany is followed by the United Kingdom (18% of EU imports in 1999), France (17%), Italy (9%) and The Netherlands (7%). In terms of volume, all countries in the EU increased their imports of sports goods between 1997 and 1999, as is shown in table 5.1. The tendencies in the same period in imports of each selected country (by product group) are given in Appendix 2.

The sources of sports goods can change considerably from year to year according to the type of articles in demand (e.g. ice skates during freezing periods).

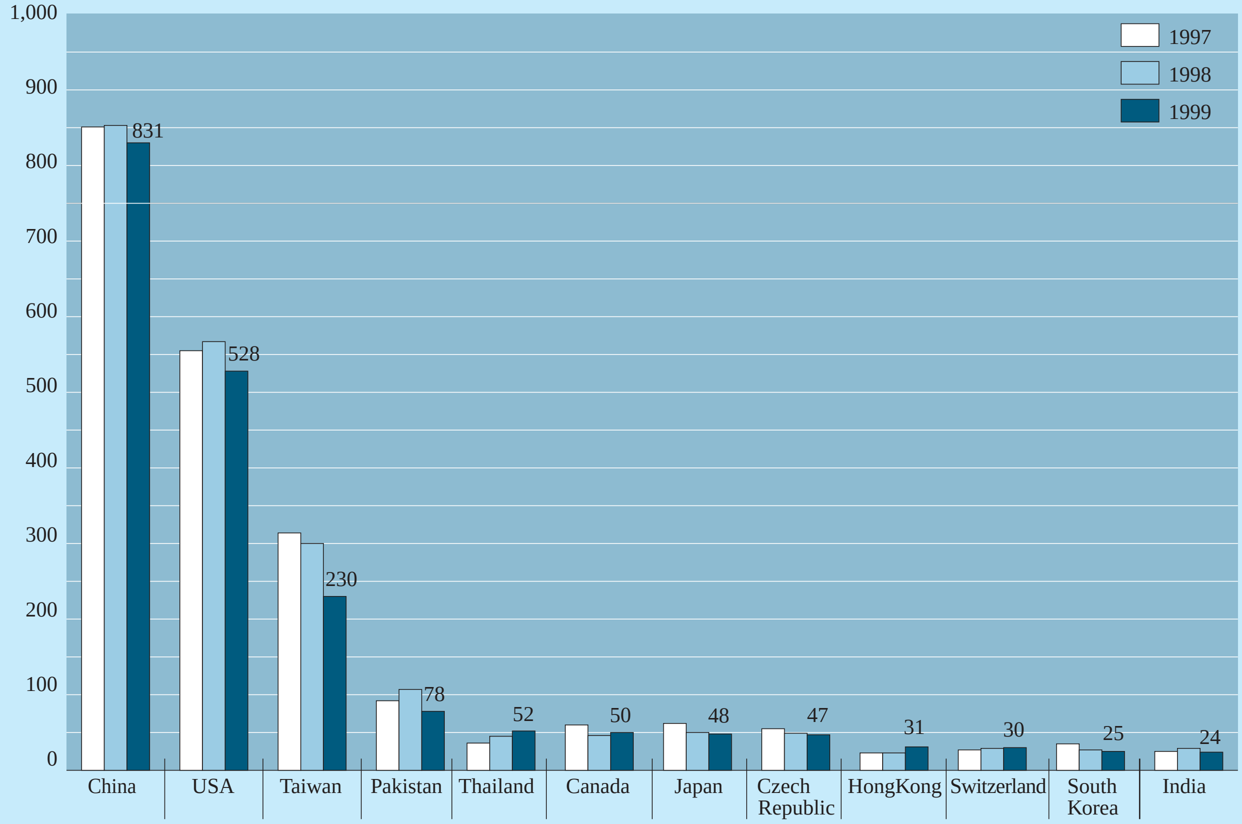
Even if orders from retailers must be placed far in advance and repeat orders are often not possible, the levels of stock held by importers in their EU warehouses or in EU distribution centres still can vary from period to period.

Table 5.1 EU imports of sports goods by EU country, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**4,021,232**	**499,841**	**4,013,902**	**522,997**	**3,870,211**	**3,651,143**	**586,516**
Germany	951,604	121,986	832,561	122,117	761,607	718,497	135,182
United Kingdom	667,740	87,800	727,928	95,080	702,860	663,075	90,912
France	618,302	76,521	646,684	80,927	645,500	608,962	94,452
Italy	349,950	35,626	339,263	35,605	331,182	312,436	41,513
The Netherlands	283,761	41,091	284,702	43,996	283,861	267,793	48,398
Belgium & Lux.	241,107	37,985	256,538	41,302	235,963	222,607	42,612
Austria	214,543	21,447	212,759	20,838	236,960	223,547	23,864
Spain	199,813	25,794	200,428	26,991	201,341	189,944	29,416
Sweden	176,222	16,102	178,765	18,921	161,365	152,231	41,351
Denmark	95,403	10,859	107,455	13,110	103,364	97,513	13,399
Finland	79,160	7,586	81,966	7,651	79,252	74,766	8,160
Ireland	51,061	4,503	54,854	4,855	53,737	50,695	4,513
Portugal	45,643	5,993	45,692	5,724	42,421	40,020	6,597
Greece	46,924	6,548	44,307	5,880	30,800	29,057	6,147

Source: Eurostat (2001)

Figure 5.1 Main non-EU suppliers of sports goodsurniture to the EU, 1997-1999
Value in US$ million



Source: Eurostat (2001)

In 1999, around 38% of EU imports came from other EU countries. The leading supplier within the EU was Italy, with 48,687 tonnes, valued at US$ 253 million, or 7% of total sports goods supplies to the EU, which were mainly equipment for fitness, watersports and in-line skates. Italy was followed in significance by France (mainly camping goods, skis and fishing tackle), Germany (fitness, outdoor sports and camping goods), Austria (snowsports equipment) and the United Kingdom (golf, footballs).

Around 62% of EU imports came from non-EU sources. Since the early 1990s, Asian countries have expanded their exports to the EU very rapidly. The huge investments in technical and design expertise from EU manufacturers in Asian countries and better communication, have stimulated this expansion. Especially in terms of volume, the increases of EU imports between 1997 and 1999 from the major supplying countries in Asia (China and Taiwan) averaged around 25%. In terms of value, EU imports from these and most other countries decreased in the same period, as is shown in figure 5.1.

China, USA and Taiwan are the largest non-EU suppliers to the EU. Other suppliers include Pakistan (balls), Thailand (watersports), Canada (outdoor sports), Japan (golf) and Czech Republic (skates).

Most Asian countries, except Japan, were able to benefit from the devaluation of their currencies relative to those in Europe, which resulted in lower prices for EU importers. A detailed overview of the sources of EU imports can be found in Appendix 2.

Total imports by selected markets within the EU

Germany

Germany is the largest EU importer of sports goods and accounted for 20% of total EU imports by value in 1999. In that year, Germany imported 135,182 tonnes with a value of US$ 761 million. Around three-quarters of imports were sourced outside the EU, while 52% of total German imports came from developing countries. Germany is a large importer of fitness equipment, in-line skates and camping goods compared to other EU countries (see table 5.2 in the next section).

With the exception of fitness, golf equipment and camping goods, German imports of all other product groups (especially in-line skates) decreased.
The main suppliers of sports goods to Germany are China (27% of total value of imports), Italy (10%) and USA (7%). Other suppliers include Taiwan (6%), France (6%), Belgium (5%), Austria (4%) and South Korea (3%).

United Kingdom

The United Kingdom is the second largest EU importer accounted for 18% of the EU total by value in 1999. Imports amounted to 90,912 tonnes, with a value of US$ 702 million. British importers sourced around 82% of their requirements in non-EU countries and 40% came from developing countries. Compared to other EU countries, the United Kingdom is a large importer of golf and fitness equipment. Between 1997 and 1999, the volume of UK imports increased, as British importers could benefit from the high Pound. Except skates, rackets and fishing tackle, all other sports goods have been more in demand in the UK. An overview of UK imports by product group is given in Appendix 2.
The main suppliers of sports goods to the UK are USA (25%) and China (19%). Other suppliers include Belgium (11%), Taiwan (7%), Italy (6%), Germany (5%), France (5%), Pakistan (5%) and India (4%).

France

France accounted for 17% of the value of EU imports of sports goods in 1999, a total value of US$ 645 million, or 94,452 tonnes. Around 44% of total French imports was sourced outside the EU, while 32% came from developing countries. Compared to other EU countries, France is a large importer of rackets, fishing tackle, watersports, outdoor sports and table tennis equipment, rackets (see also table 5.2). French imports of sports goods rose by 24% in volume terms between 1997 and 1999. Especially demand for snowsports, watersports, fitness equipment, in-line skates and fishing tackle has grown.
In 1999, most French imports of sports goods came from China (24% of total value of imports), Italy (18%), Germany (16%), USA (14%), Austria (11%) and Taiwan (8%). Other suppliers include United Kingdom (8%), Belgium (6%), Spain (5%), South Korea (4%), Pakistan (5%) and Thailand (3%).

Italy

In 1999, Italy imported 41,513 tonnes with a value of US$ 331 million. Around 46% of imports was sourced outside the EU and 33% came from developing countries. Between 1997 and 1999, Italian imports of sports goods increased by 15% in terms of volume, resulting from increased imports of equipment for fitness, snowsports, watersports, outdoor sports and camping. In the same period, the value of Italian imports of all sports goods showed a decreasing trend, as in most other selected EU countries. An overview of Italian imports by product group is given in Appendix 2.
In 1999, most Italian imports of sports goods came from China (20% of total value of imports).
Other suppliers include Taiwan (9%), Austria (7%), USA (7%), Germany (7%), France (7%), South Korea (6%), Spain (4%), Czech Republic (4%), Hong Kong (4%), Belgium (4%) and The Netherlands (3%).

Spain

In 1999, Spanish imports of sports goods were 29,416 tonnes, or US$ 201 million, representing 5% of total EU imports. Around 55% of Spanish imports were sourced outside the EU and 41% came from developing countries. Spain has relatively high imports of equipment for fitness and outdoor sports, both of which showed an increase between 1997 and 1999. With the exception of rackets, balls and skates, Spanish imports of all other product groups increased in terms of value, especially those of equipment for fitness, golf and watersports.
China (24%) and Italy (17%) are the main suppliers to Spain. Other suppliers include France (10%), Belgium (7%), Taiwan (5%), USA (5%), United Kingdom (4%), Germany (4%), Austria (4%) and The Netherlands (4%).

The Netherlands

In 1999, imports amounted to 48,398 tonnes, with a value of US$ 283 million. Around 70% came from non-EU sources and 43% from developing countries.
The Netherlands is a sizeable exporter of sports goods owing to re-export activities. In some product groups a high proportion of imports (for example, up to 60% for fitness equipment in 1999), especially from China, Hong Kong and Taiwan, are re-exported by the Dutch importers/traders to other EU countries.
Moreover, The Netherlands is an important location for the European distribution centres of Reebok and Asics.
In terms of volume, the total Dutch imports of sports goods increased by 17% between 1997 and 1999.
Imports of all product groups increased, except those of balls, rackets and in-line skates. China (21%), Hong Kong (19%), Taiwan (11%) and USA (9%) were the main suppliers, while other suppliers include Germany (8%), Italy (7%), Thailand (6%), Pakistan (5%), Poland (4%) United Kingdom (3%), Austria (3%), Slovenia (3%), France (3%) Czech Republic (3%) and Indonesia (3%).

5.2 Imports by product group

Selected EU markets by product group
As is shown in table 5.2, United Kingdom was in 1999 the largest importer within the selected EU countries of golf equipment. Germany is a large importer of equipment for fitness, snowsports, skates and camping goods, while France relatively imports much equipment for watersports, table tennis rackets and fishing tackle. Italy is a large importer of skis and other equipment for snowsports.

EU total by product group
The main product groups of sports goods imported by the EU and the development between 1997 and 1999 are shown in figure 5.2. In terms of value, equipment for fitness, outdoor sports and (in-line) skates were large product categories, which together accounted for 43% of EU imports in 1999.

In period of review, EU imports of all sports goods increased by 17% in volume terms, i.e. from 499 to 586 thousand tonnes. Particularly equipment for fitness,

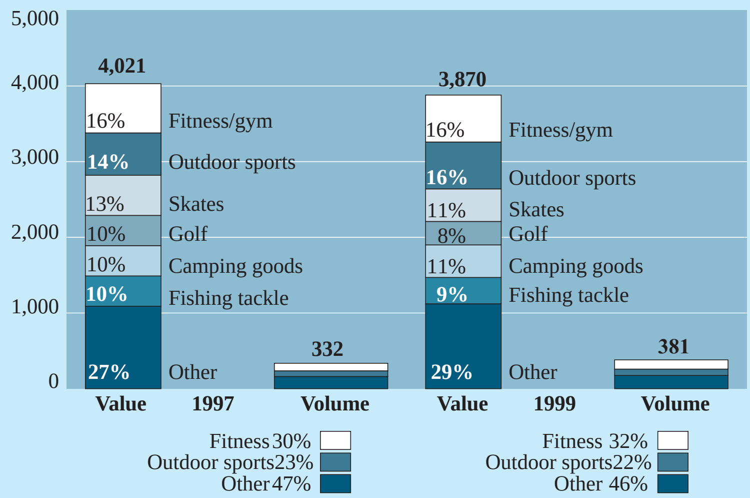
Table 5.2 Imports by the major selected EU markets within the EU by product group, 1999

Product group	EU imports US$ million	Imports by selected EU market As percent of total value									
Fitness/gym	607	Germany	(24%)	UK	(23%)	France	(8%)	NL	(8%)	Spain	(5%)
Golf	428	UK	(46%)	Germany	(12%)	France	(8%)	Spain	(5%)	Italy	(3%)
Snowsports	378	Germany	(22%)	Italy	(22%)	France	(14%)	Spain	(3%)	UK	(2%)
Skates	342	Germany	(35%)	France	(16%)	UK	(8%)	NL	(7%)	Italy	(6%)
Balls	268	Germany	(20%)	France	(17%)	UK	(15%)	NL	(9%)	Italy	(9%)
Watersports	260	France	(27%)	Germany	(19%)	UK	(13%)	Italy	(8%)	Spain	(7%)
Rackets	161	France	(19%)	Germany	(14%)	NL	(13%)	UK	(11%)	Italy	(10%)
Table tennis	35	France	(29%)	Germany	(25%)	UK	(9%)	Italy	(6%)	NL	(6%)
Outdoor sports	626	France	(20%)	Germany	(18%)	UK	(17%)	Italy	(9%)	NL	(8%)
Camping goods	410	Germany	(26%)	France	(15%)	UK	(15%)	NL	(13%)	Italy	(4%)
Fishing tackle	354	France	(21%)	Germany	(16%)	UK	(13%)	Italy	(12%)	Spain	(7%)

Note: NL = The Netherlands

Source: Eurostat (2001)

Figure 5.2 EU imports of sports goods by major product group, 1997-1999
As percent of value in US$ million / volume in thousand tonnes



Source: Eurosat (2001)

golf, snowsports, watersports and camping goods were more in demand. In terms of value, EU imports decreased by 4%, from US$ 4,021 to 3,870 million, as result of lower prices of most articles (in-line skates, balls, rackets, outdoor sports and fishing tackle).

In trade statistics a distinction is made according to the different sporting activities with its related sports goods, which are further divided in terms of the material used. A detailed breakdown of product groups imported by the EU can be found in Appendix 2.

Import statistics for each separate product group and specific information about supplies from developing countries can also be found in Appendix 2. Product groups, which are relevant to exporters from developing countries are described below:

Fitness / gym
This product group includes fitness and training equipment for in-home use, which includes exercise bikes, free weights, treadmill/steppers and 'other equipment' (e.g. stomach exercisers, AB Toners, rollers, exercise mats) and resistance equipment (small wrist, hand, thigh exercisers, chest expanders). Larger items of equipment, usually bought by institutions or fitness centres, are also included here.

In 1999, fitness equipment accounted for 16% of total EU imports of sports goods, representing a value of US$ 607 million. In terms of volume, this product group accounted for 32% of total imports of sports goods, as was shown in figure 5.2. Between 1997 and 1999, EU imports increased by 10% in value, while in terms of volume, imports increased by 24%.
All selected EU countries, except the United Kingdom, imported more fitness equipment. As shown in figure 5.3, in 1999, 28% of EU imports of fitness equipment came from other EU countries, (Italy, Germany and Finland), while 30% came from Taiwan.
The USA, China, Malaysia and Thailand are other important non-EU suppliers. Statistics concerning the development of EU imports of this product group can be found in Appendix 2.

Developing country supplies of fitness equipment other than China, Malaysia and Thailand included smaller sources South Korea (1% of value of EU imports of fitness equipment), Pakistan, India, Sri Lanka and Turkey. Between 1997 and 1999, EU imports from all these countries have risen.

Golf
Within the EU sports goods imports golf equipment was the second largest product group and represented in 1999 a value of US$ 428 million.
Golf clubs accounted for 53% of EU imports of golf equipment and, between 1997 and 1999, the volume of imports of this major sub-category increased by 38%, reaching a total of US$ 225 million.
Golf balls are a large category in terms of volume. Imports of golf balls rose in the same period from US$ 74 to 89 million. Imports of golf related equipment, parts and accessories, which formed nearly one third of EU imports, have been stable between 1997 and 1999.

Table 5.3 EU imports of golf equipment

	Volume	Share	Value	Share
Golf clubs	3,684	22%	225	53%
Golf balls	7,464	44%	89	21%
Other golf equipment	5,774	34%	114	26%
Total golf equipment	**16,992**	**100%**	**428**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

Within the selected EU countries, especially the United Kingdom and Germany increased their imports of golf equipment between 1997 and 1999.

As shown in figure 5.3, the USA supplied almost three-quarters of golf equipment to the EU and imports of US golf equipment during the period of review rose by 4%. Other significant suppliers of golf equipment include United Kingdom, China, Taiwan, Japan and Germany.

In 1999, the share of developing countries in supplies of golf equipment in value was rather low (around 18%), although in terms of volume, the share of this product group in EU imports was 35%. Apart from China, other developing countries included South Korea, Thailand, Malaysia, India, Pakistan, Vietnam, Mexico and Tunisia. Most countries supplied other golf equipment (trolleys, carts, bags, accessories) and golf balls. Between 1997 and 1999, the volume of EU imports from all countries, except Malaysia and Mexico, have increased, as is shown in the import statistics of this product group, which can be found in Appendix 2.

Skates
In 1999, this product group accounted for 9% of total EU imports, representing a value of US$ 341 million. Since in-line skating has been a trend from 1996 onwards, imports of these skates, particularly by Germany, United Kingdom and France grew enormously. Despite the decline in popularity by the end of the 1990s, particularly in the United Kingdom, *in-line skates* are still the largest sub-category within this product group.

Table 5.4 EU imports of skates

	Volume	Share	Value	Share
Ice skates	2,939	5%	36	11%
Roller / In-line skates	34,020	91%	279	82%
Parts for skates	2,331	4%	26	7%
Total skates	**39,290**	**100%**	**341**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

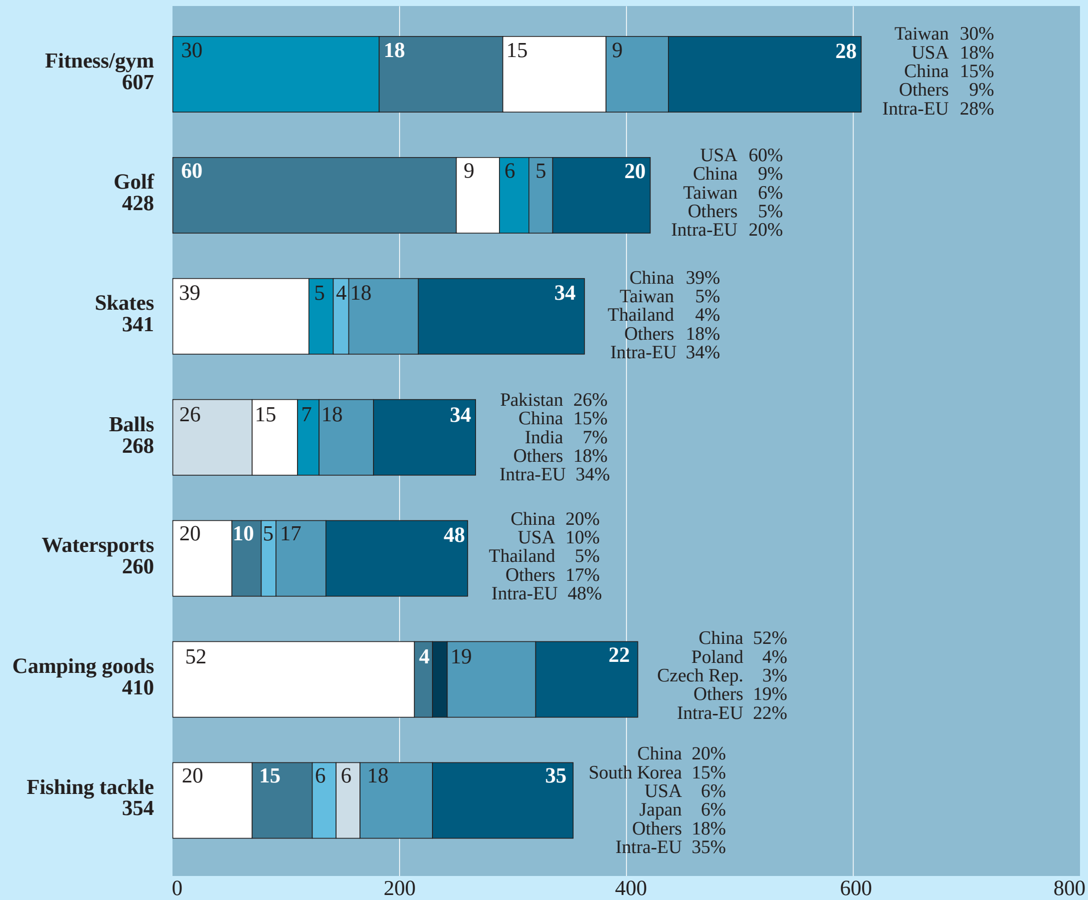
Between 1997 and 1999, the value of EU imports of skates decreased by 50%. In terms of volume, EU imports of skates decreased by 30%, from 51,176 to 39,290 tonnes, which indicates a drop in prices.

This was particularly the case in imports from other EU countries (Italy and France), which accounted for almost 34% of supplies in 1999.

Imports from the major supplier, China (39% of total value), decreased considerably in the period of review. This was due to less EU demand for in-line skates, but this was also the result of EU counter measures against the growing dumping practices of Chinese companies, selling in-line skates at very low prices to any importer or retailer in Europe. Other significant non-EU suppliers for skates included Taiwan (5%), Thailand and USA.

In 1999, the share of developing countries in supplies of skates was around 47%. Apart from China, other developing countries supplying skates included Thailand (4% of total value of EU imports), South Korea, Vietnam, Malaysia and smaller supplying countries like Mexico, Philippines, Slovenia and Tunisia.

Figure 5.3 EU imports of sports goods by product group, 1999
Main suppliers as percent of total value (in US$ million)



Source: Eurostat (2001)

Balls
In 1999, balls represented 7% of all EU imported sports goods with a total value of US$ 268 million.
The most important category within this product group are *inflatable balls* (with a large proportion made of plastic) accounting for 63% of the total EU imports of balls, as is shown in table 5.5. After a rise in EU imports of footballs, during the European Cup competitions in 1998, imports declined to a volume of 22,013 tonnes in 1999, representing a relatively lower value of US$ 180 million (see table 'EU imports of product group detailed' in Appendix 2). *Tennis balls* are another large category (around 15% of all imported balls) and between 1997 and 1999, EU imports of tennis balls decreased. In 1999, imported tennis balls accounted for US$ 45 million (or 5,339 tonnes).

Imports of the category *other balls* include cricket, polo, hockey, baseball etc., which in terms of volume showed an upward trend in the period of review.

Table 5.5 EU imports of balls

	Volume	Share	Value	Share
Tennis balls	5,339	15%	45	17%
Inflatable balls	22,013	63%	170	63%
Other balls	7,499	22%	53	20%
Total balls	**34,851**	**100%**	**268**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

In 1999, around 34% of EU imports of balls came from other EU countries, as is shown in figure 5.3.
Within the EU, the United Kingdom and the distribution centres of Nike in Belgium supplied most inflatable balls to other EU countries. Pakistan, as the largest football manufacturer in the world, accounted for 26% of total supplies of balls to the EU in 1999. Other important non-EU sources include China (15% of total supplies) and India (7%).

In 1999, the share of developing countries in the supplies of balls was 60%. Smaller supplying countries include Philippines (5%), Thailand (4%), Indonesia, Morocco, Mexico, South Korea and Vietnam. Statistics concerning the development of EU imports of balls can be found in Appendix 2.

Watersports
Demand for watersports equipment in the EU has increased steadily in terms of volume. In 1999, this product group accounted for 7% of total EU imports, representing a value of US$ 260 million. Within the EU, France is the largest importer.
Waterskis and surfboards accounted for more than half of total EU imports of watersports equipment, as is shown in table 5.6. Between 1997 and 1999 imports of this sub-category increased by 13% in volume terms reaching 12,879 tonnes in 1999. In the same period, EU imports of *inflatable vessels* increased by 36% in volume and imports of *sailboards* increased as well (see table 'EU imports of product group detailed' in Appendix 2).

Table 5.6 EU imports of watersports equipment

	Volume	Share	Value	Share
Tennis balls	5,339	15%	45	17%
Sailboards	2,083	9%	58	22%
Waterskis, surfboards	12,897	57%	133	51%
Inflatable vessels	7,652	34%	57	27%
Total watersports equipment	**22,632**	**100%**	**260**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

More watersports equipment was imported from the China, Italy, USA and especially from Spain, which more than doubled its exports to EU countries. In 1999, almost half of EU imports came from other EU countries, as is shown in figure 5.3. In the same year, China supplied 20% of watersports equipment to the EU. Other supplying developing countries include Thailand, South Korea, Sri Lanka, Malaysia, Vietnam, South Africa, Mexico and Tunisia.

Other sports equipment
Snowsports: Between 1997 and 1999, the volume of EU imports of snowsports equipment increased by 12%, from 17,452 to 19,588 tonnes. In the same period, EU imports slightly decreased in terms of value, which indicates a drop in prices, especially for skis.
Skis for ski jumping, alpine skiing and cross country skiing accounted for more than half of EU imports of snowsports equipment.

After the fall in demand for skis, however, imports increased because of new popular snowsports such as carving and snowboarding. Imports of *ski equipment* (ski sticks, parts etc.) and *ski bindings* have also increased (see table 'EU imports of product group detailed' in Appendix 2).
Major supplying countries include France, Austria, Germany, USA, Norway, Italy and Eastern EU

countries. In 1999, the share of developing countries in the supply of snowsports equipment was only 4%.

Rackets/table tennis: In the period of review, EU imports of rackets increased by 5% in terms of volume, reaching 9,450 tonnes in 1999. Similar to snowsports equipment, the average prices of rackets are decreasing. In all selected countries, except France, imports of rackets declined as a result of squash and badminton being less popular. In addition, fewer *tennis rackets* were imported in the period of review, which still accounted for 65% of total value of EU imports of rackets (see table 'EU imports of product group detailed' in Appendix 2). China supplied almost 70% of rackets to the EU, followed by Czech Republic, Taiwan, Italy, Japan, Austria, and USA. Imports of table tennis equipment also dropped by 22% in the period of review, to a value of US$ 35 million, with Germany and China as the major suppliers.

Outdoor sports/Team sports: This group includes all equipment used for athletics and team sports.
In Eurostat statistics this product group divided into cricket equipment, which accounted for only 1% of EU imports and a very large group of many other team and field sports. This fragmented group ranges from football to hockey, basketball and baseball articles and includes equipment for athletics, swimming and paddling pools. In 1999, this large single category accounted for 16% of all EU sports goods imports, with a value of US$ 625 million. Between 1997 and 1999 imports of equipment for outdoor sports increased by 12% in terms of volume.
Because of the large variety in products there are many supplying countries led by China, USA, France, Netherlands, Taiwan, India, Ireland and Sweden.

Camping goods
(including equipment for outdoor activities)
In the period of review, EU imports of camping goods grew along with the growing popularity of the recreational outdoor activities in all selected EU countries. In 1999, EU camping goods imports represented a value of US$ 410 million, or 11% of total EU sports goods imports. Between 1997 and 1999, the value of EU imports of camping goods increased by around 30% in volume terms.

Tents accounted for almost 53% of the total value of EU imports of camping goods, as is shown in table 5.7. Tents manufactured from synthetic fibres form the largest part of this sub-category and EU imports between 1997 and 1999 have grown, which has been at the expense of tents made of cotton and textiles (see table 'EU imports of product group detailed' in Appendix 2).

Sleeping bags accounted for some 25% of EU camping goods' imports, which increased between 1997 and 1999, to a total value of US$ 104 million. Imports of textile air mattresses showed an increasing tendency as well.

Table 5.7 EU imports of camping goods

	Volume	Share	Value	Share
Tents *(cotton)*	4,120	5%	25	6%
Tents *(synthetic fibres)*	31,286	38%	171	42%
Tents *(textile)*	4,529	5%	19	5%
Air mattresses *(cotton)*	3,876	5%	10	2%
Air mattresses *(textile)*	4,158	5%	15	4%
Miscellaneous camping *(cotton)*	1,997	2%	8	2%
Miscellaneous camping *(textile)*	21,082	25%	58	14%
Sleeping bags	12,080	15%	104	25%
Total camping goods	**83,128**	**100%**	**410**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

Around 50% of camping goods come from China, while other EU countries (Germany, Belgium and Denmark) supplied 22% to the EU, as is shown in figure 5.3. Eastern European countries, like Poland, Czech Republic and Slovenia are also sizeable suppliers to the EU.

Developing country supplies of camping goods other than China included smaller sources Vietnam (3% of value of EU imports of camping goods), Bangladesh, South Korea, Sri Lanka, Indonesia, Malaysia, Tunisia, Philippines and Cambodia. Between 1997 and 1999, EU imports from most of these countries have risen, as is shown in the import statistics for camping goods, which can be found in Appendix 2.

Fishing tackle
Demand for fishing tackle in the EU has increased between 1997 and 1999 in terms of volume, since fishing hooks and fishing reels have been more in demand. On the other hand, the value of total EU imports of fishing tackle decreased by 10% in the same period, indicating falling prices which was the case in all product sub-categories (see table 'EU imports of product group detailed' in Appendix 2).

In terms of value, the share of fishing lines in total EU imports of fishing tackle is large (around 45%), as is shown in table 5.8.

Table 5.8 EU imports of fishing tackle

	Volume	Share	Value	Share
Fishing rods	4,643	25%	99	28%
Fishing hooks	2,082	11%	28	8%
Fishing reels	3,415	19%	71	20%
Fishing lines	8,312	45%	136	44%
Total fishing tackle	**18,452**	**100%**	**354**	**100%**

Note: EU imports of 1999 are given in tonnes and US$ million;

Source: Eurostat (2001)

EU suppliers, especially Italy, France, United Kingdom, Germany, Norway and Finland accounted for 35% of total EU imports of fishing tackle. Significant non-EU suppliers included China (20% of supplies), South Korea (15%), USA (6%), Japan (6%) and Taiwan. Suppliers from developing countries were Malaysia, India, Philippines, Thailand, Madagascar, Tunisia, Bangladesh, Kenya and Vietnam.

5.3 The role of developing countries

China, Pakistan, Thailand, South Korea and India dominate the supply of sports goods from developing countries. In 1999, they together accounted for 70% of supplies to the EU from developing countries.
In the past few years, Malaysia, Vietnam, Philippines and Sri Lanka have become important suppliers.
Only a few countries in Latin America and Africa have been able to obtain a significant position in the international sports goods trade for the following reasons:

- In most countries, sports goods are handmade and labour intensive. Production capacity, the level of technology, flexibility, good communications, product innovations and variety in design are limited.
- EU manufacturers continue to contract to foreign manufacturers in Asian (especially China) and Eastern European countries, which are much ‘closer’ and more flexible in terms of meeting their specific requirements.
- It is difficult for many developing countries to meet the high quality requirements and strict safety standards, which are often demanded in the EU market.
- Brands are extremely important in sports and camping goods. For exporters from developing countries it is expensive to promote a new product intensively. It usually takes a few years before a new brand is being recognised by consumers.

Table 5.9 Changes in supplies of sports goods from developing countries to the EU, 1997-1999 Tonnes/US$ 1,000

	1997		1998		1999		volume change %
	value	volume	value	volume	value	volume	1997-1999
Total from DCs	**1,601,081**	**270,618**	**1,576,296**	**288,371**	**1,505,726**	**319,652**	**18%**
China	852,706	162,697	853,225	172,578	831,653	203,329	42%
Pakistan	92,499	10,571	107,735	12,381	78,362	8,810	– 13%
Thailand	45,666	6,245	36,441	4,574	52,175	5,216	– 17%
South Korea	35,759	5,767	26,950	4,328	24,500	4,633	– 19%
India	25,766	4,015	29,169	4,663	23,980	3,939	– 2%
Malaysia	20,596	3,229	16,797	3,697	14,599	3,715	15%
Slovenia	10,873	631	17,009	1,226	12,352	891	41%
Vietnam	5,695	1,417	8,487	1,596	8,718	1,772	25%
Indonesia	9,080	1,397	9,591	1,208	7,062	924	– 51%
Sri Lanka	6,020	150	5,370	161	6,355	222	48%
Philippines	1,126	97	2,293	244	3,487	443	456%
Tunisia	521	72	593	146	2,378	234	325%
Mexico	1,813	165	3,781	336	2,174	188	13%
South Africa	1,190	99	1,935	283	1,602	281	283%

Note: - DC = developing country

Source: Eurostat (2001)

Table 5.10 EU imports from developing countries by product group, 1999

Product group	DC supplies US$ million	Major supplies from developing countries to the EU % of total import value
Fitness/gym	281	China (32%), Malaysia (3%), South Korea (1%), Thailand (1%), Pakistan (0.5%), India (0.3%), Sri Lanka (0.2%), Turkey (0.1%), (0.4%).
Balls	268	Pakistan (26%), China (15%), India (7%), Thailand (5%), Philippines (1%), Indonesia (1%), Morocco (0.5%), Mexico (0.1%), South Korea (0.1%), Vietnam.
Skates	163	China (81%), Thailand (9%), South Korea (3%), Vietnam (1%), Malaysia (0.7%), Mexico (0.1%), Philippines (0.1), Indonesia (0.1%), Slovenia, Tunisia.
Watersports	86	China (60%), Thailand (15%), South Korea (6%), Sri Lanka (6%), Malaysia (2%), Vietnam (2%), Slovenia (2%), South Africa (1%), Mexico (0.2%), Tunisia (0.2%).
Golf	79	China (48%), South Korea (5%), Thailand (3%), Malaysia (1%), India (1%), Pakistan (0.5%), Vietnam (0.4%), Mexico (0.2%), Tunisia.
Camping goods	263	China (81%), Vietnam (4%), Slovenia (4%), Bangladesh (1%), Sri Lanka (1%), South Korea (1%), Indonesia (0.6%), Malaysia (0.6%), Philippines (0.6%).
Fishing tackle	185	China (44%), South Korea (33%), Malaysia (3%), India (3%), Philippines (3%), Thailand (3%), Madagascar (2%), Tunisia (2%), Bangladesh (0.8%), Kenya.

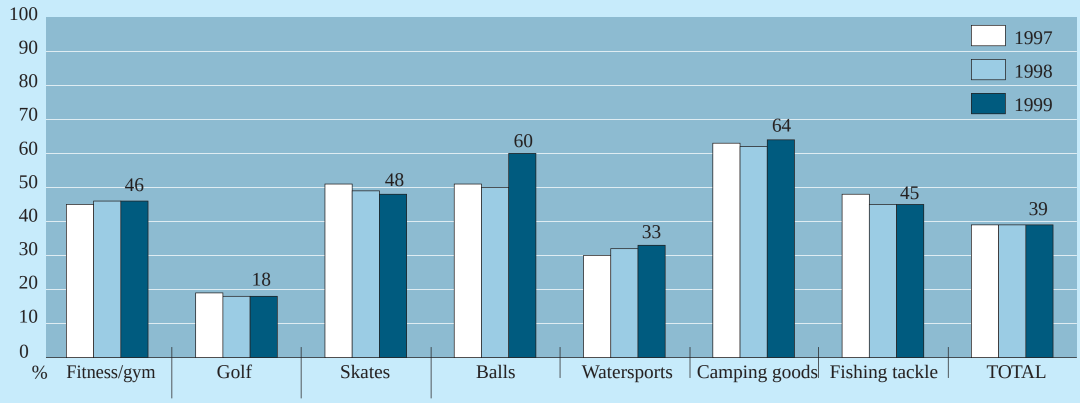
Source: Eurostat (2001)

Nevertheless, exports from developing countries to the EU showed a steady increase between 1997 and 1999. The volume of imports from developing countries rose by 18% from 270 to 319 thousand tonnes, valued at US$ 1,505 million in 1999. The largest increases were in the supplies from China, while less was imported from significant supplying countries like Pakistan, Thailand, South Korea, India and Indonesia. Other developing countries like Malaysia, Slovenia, Vietnam, Sri Lanka, Philippines, Tunisia, Mexico and South Africa increased their supplies to the EU, as is shown in table 5.9.
Statistics for EU imports of each individual product group are also given in Appendix 2 and supplies from developing countries are emphasised.

Between 1997 and 1999, the EU imported more equipment for fitness, watersports, golf, balls and camping goods from developing countries (which includes imports from China). The share of each product group and the major developing country suppliers are shown in table 5.10.

The share from developing countries in the total value of EU imports of sports goods remained around 39% between 1997 and 1999. The supplies from developing countries in equipment for fitness, watersports, balls and camping goods have increased. The shares and trends in the period of review in the supplies from developing countries of the selected product groups are shown in figure 5.4.

Figure 5.4 Supply of developing countries to the EU by selected product groups, 1997 - 1999
As percent of total supply (based on value in US$)



Source: Eurostat (2001)

6 EXPORTS

Total exports by the EU
The EU is among the leading exporters of sports goods in the world. Significant exporters of sports goods include France and Italy, reflecting their international leadership role in sports goods and sportswear.
In 1999, the EU exported 307 thousand tonnes with a value of US$ 3,084 million. Between 1997 and 1999, EU exports increased by 15% in volume and decreased by 1% in value. The volume increase was mainly due to higher exports by all of the selected EU countries, especially France, United Kingdom and The Netherlands.

France, as a major producer, is the largest exporter of sports goods in the European Union and accounted for 21% of all EU exports in 1999: 50,543 tonnes, with a value of US$ 648 million. France is followed by Italy (18% of EU exports in 1999), Germany (13%), Austria (13%), United Kingdom (11%), The Netherlands (5%), Belgium (4%), Spain (4%), Sweden (4%), Denmark (3%), and Finland (3%).

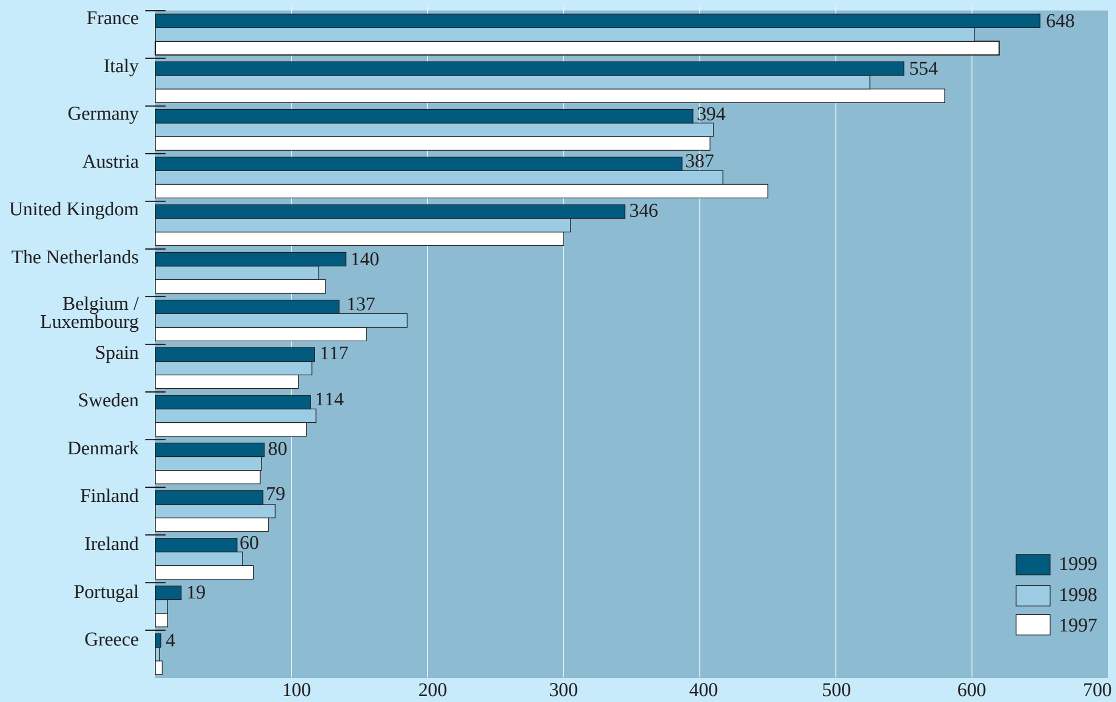
Appendix 2 lists export statistics for the EU (by country and by product group). The sports goods exported by the EU in 1999 were: equipment for snowsports (26% of total EU sports goods export value), outdoor sports (18%), fitness (9%), watersports (8%), skates (8%), golf (7%), balls (5%), camping goods (6%) and fishing tackle (9%). Exports to non-EU destinations increased in terms of volume by 45% between 1997 and 1999. However, the value of EU export has slightly declined, due to the devaluation of currencies in Asian countries and a stagnation of EU exports to Japan and Hong Kong. Stronger exports to Eastern Europe, Russia and the USA have compensated the declining exports to Asian countries, which were affected by the recession.

Exports by the selected markets within the EU

France

France is the largest exporter of sports goods, exporting a value of US$ 648 million or 21% of total EU exports in 1999. The most important product groups within the French exports are equipment for snowsports, outdoor sports, water sports, skates and fishing tackle, with large increases in exports of skates, rackets, equipment for fitness, outdoor sports and camping goods. Exports of golf equipment drastically decreased between 1997 and 1999. Major destinations of French exports were USA, Japan, Italy and other EU countries.
Major non-EU customers were Hong Kong, Canada, Russia and Australia.

Figure 6.1 EU exports of sports goods, 1997 - 1999 US$ million



Source: Eurostat (2001)

Italy

Italy controlled an 18% share of all sports goods and exported a volume of 52,075 tonnes, valued at US$ 554 million in 1999. Within the Italian exports, the most important product groups were in-line skates, equipment for snowsports, watersports, outdoor sports and fitness. Between 1997 and 1999 Italy exported more skis, snowboards, surf/sail boards and other watersports articles and equipment for outdoor sports. Exports of in-line skates drastically decreased in the period under review. Major destinations of Italian exports were USA, Japan, Germany, France and other EU countries.

Germany

As the third largest exporter of sports goods in the EU, Germany exported a value of US$ 387 million in 1999, which represented 13% of total EU exports.
The most important product groups within German export are fitness/gym, snowsports, water sports, skates and balls. Between 1997 and 1999, German exports decreased by 3% in terms of value, with the large decreases in exports of table tennis, snowsports and golf equipment. Major destinations of German exports were other EU countries and USA. Other non-EU customers include Japan, Russia, Czech Republic, Poland, Hungary, Canada and Turkey.

United Kingdom

In 1999, the United Kingdom exported 40,412 tonnes of sports goods with a total value of US$ 346 million, or 11% of total EU exports. The UK is a sizeable exporter of sports goods owing to the presence of many specialised manufacturers of sports equipment and it re-exports items such as golf equipment, balls and fishing tackle. The most important product groups are golf, balls, fitness/gym and outdoor sports. Between 1997 and 1999 the volume of British exports has more than doubled, with large increases in exports of golf equipment and balls. Major destinations of UK exports were other EU countries and USA.

Spain

Spain is a sizeable EU exporter of sports goods and exported a value of US$ 117 million in 1999, or 5% of total EU exports. Within the Spanish exports, the most important product groups are equipment for snowsports, fitness, golf, and balls, with large increases in exports of skis, snowboards, surf/sail boards and equipment for golf and outdoor sports. Exports of in-line skates and balls decreased in the period under review.
Major destinations of Spanish exports were Germany, France, Portugal, Italy, United Kingdom, USA, Chile, Japan, Singapore, Switzerland, Canada, Mexico, Israel and Russia.

The Netherlands

The Netherlands exported a total volume of 25,195 tonnes of sports goods valued at US$ 140 million in 1999. Despite the fact that domestic production is very small, The Netherlands is a sizeable exporter of sports goods because of re-exporting by large distribution centres owned by Reebok and Asics.
The most important product groups are fitness/gym, outdoor sports, balls, skates and water sports, with large increases in exports of balls, skates, fitness and table tennis equipment. Major destinations of Dutch exports were other EU countries, USA Switzerland, Japan, Norway, Ireland, Poland and Russia.

An overview of EU exports by country and product group can be found at the end of Appendix 2.

7 TRADE STRUCTURE

7.1 EU trade channels

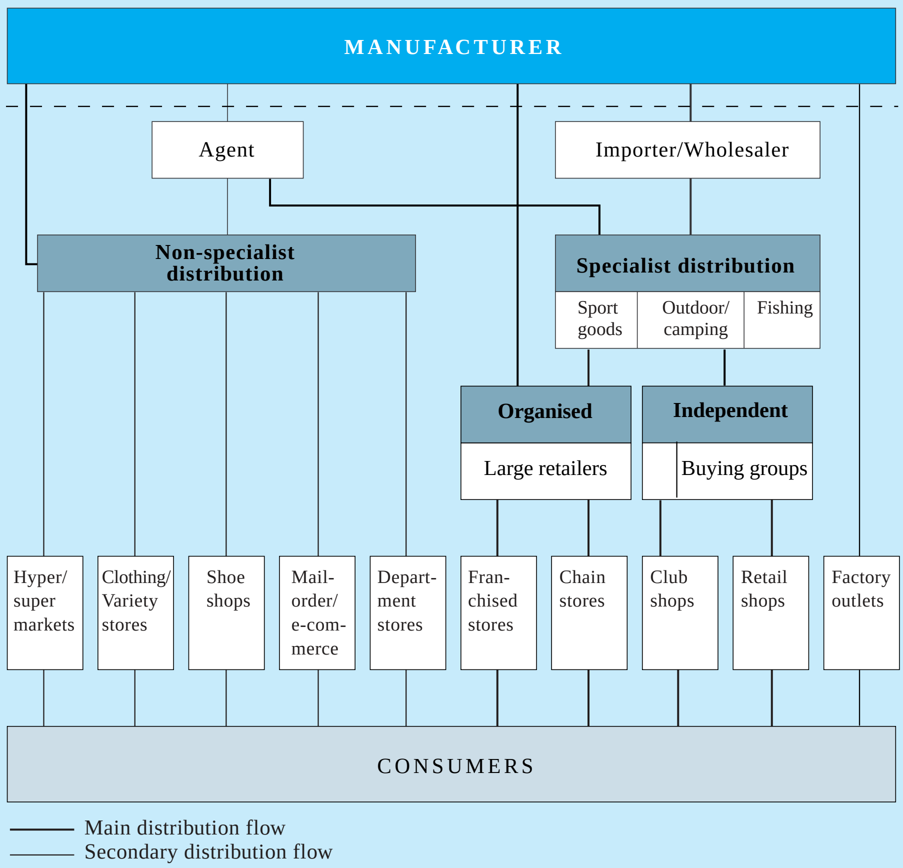
The large brand manufacturers have their own distribution networks or sell directly to consumers. Smaller manufacturers operate through importers/ wholesalers and/or agents. In the past few years, sports goods (particularly sports clothing and footwear) has become much more available within all the selected EU markets. The driving factors have been an increased demand in the mid 1990s and an increase in sales by non-specialised retail outlets such as clothing stores, department stores, shoe shops, hyper- and supermarkets. The distribution structure for sports and camping goods is shown below:

Manufacturers
Over 90% of sport and camping goods are produced outside the EU, especially in Asian countries. Most brand manufacturers (Nike, Adidas, Reebok etc.) have their headquarters in the USA or in the EU. Sports goods are mostly sold in the form of product collections (sports equipment with related sports clothing, footwear and accessories). These are often fixed ranges, which are typically supplied once each season and often repeat orders are not possible. Brand manufacturers have their own exclusive importers in each country, who are engaged in sales and service. The actual distribution of the goods is controlled by their distribution centre.

For example, Nike has its distribution centre for all EU countries in Belgium. With the advanced order control systems, they are able to supply any EU country within 48 hours. A development in the mid 1990s is the establishment of *factory outlets* by manufacturers, which sell out of date articles from unsold stock direct to consumers.

Importers/wholesalers
Importers purchase directly from foreign manufacturers, sell the sports goods in their own country and are familiar with the local market situation. Those importers who are not exclusively linked to a brand manufacturer usually buy and sell the goods, take care of import/ export procedures and hold items in stock.

Figure 7.1 Typical EU distribution structure for sports and camping goods



NOTE: Sport goods includes here sports equipment, clothing and footwear.

Many importers sell directly to retailers through permanent exhibition centres, while others have their own sales staff, who visit retailers on a regular basis and who take orders. ***Wholesalers***, often supply the independent sports shops and play a major role in the sports equipment. They either specialise or carry a wide variety of products or brands. The tendency for the bigger retailers and buying groups to go outside the traditional distribution system, along with the development of parallel imports and brand imitations caused wholesalers to reconsider their position in the distribution structure. This has encouraged wholesalers, who were losing part of their business, to operate on a more regional basis.

Agents
These are mainly independent companies which negotiate and settle business on the instructions of their principals and which act as intermediaries between buyer and seller. They do not buy or sell on their own account and work on a commission basis. Most agents represent more than one exporter, although competition is avoided. Agents are more common in southern EU countries.

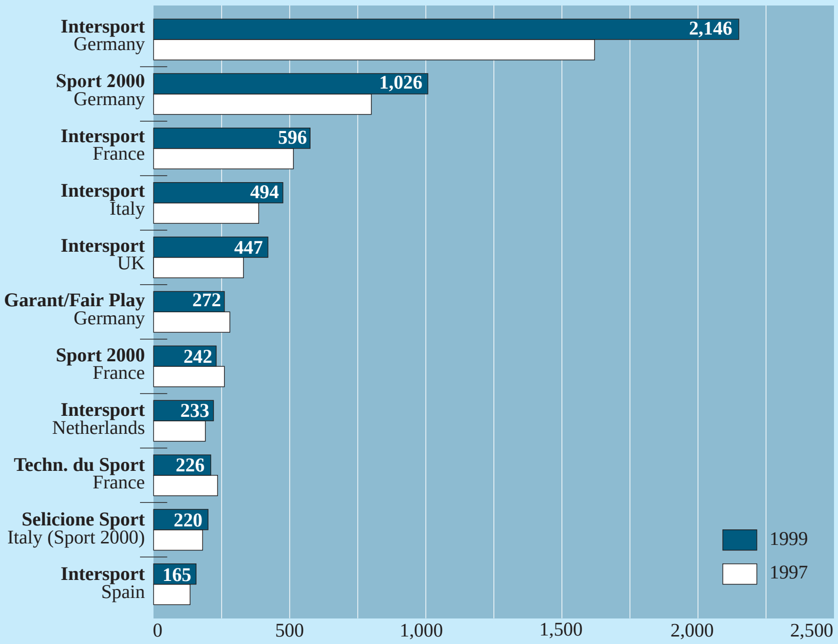
Buying groups
These groups act as purchasing agents for their individual members (retail shops) and act as financial intermediaries between suppliers and retailers.
Before each season starts, sports collections are selected by committees which are made up of members of the buying group. The largest European buying group is *Intersport*, with about 4,200 member outlets in 12 EU countries. Other major buying groups include *Sport 2000* and *Fair play*. In most EU counties, the membership level has grown, as is shown in figure 7.2.

The objective of the buying group is to make it possible for its members to compete with large chain stores. As a group, they also have the buying power, which is necessary to get greater discounts from suppliers. Many retailers in Germany and The Netherlands are connected to buying groups.

Retailers
As is shown in figure 7.1, the structure of sports goods distribution can be broadly divided as follows:

- ***Specialist distribution,*** where all retailers specialise in sports goods or in sub-sectors such as outdoor/ camping goods or fishing tackle. In 1999, the share of retail sales accounted for by specialist retailers in the six selected markets averaged 60%. Specialists can be organised or independent. Organised retailers are the large chain stores and franchised stores. Independent retailers are smaller shops, who can be completely independent which are more common in southern EU countries. Most independent retailers in northern EU countries joined forces through large scale purchasing belonging to a buying group.

Figure 7.2 Major buying group of sports goods in the selected EU markets, 1997 - 1999
Sales value in US$ million



Source: SRE (2000)

- ***Non-specialist distribution,*** which includes all those who operate in sports goods and in other products, like hyper/super markets, clothing variety stores, shoe shops, department stores, mail order companies. In 1999, retail sales by non-specialist retailers accounted for around 40% of total sales.

Retailers - Specialised outlets
In France, Germany and The Netherlands many independent sports shops suffered from the competition in the sportswear market from chain stores, which still grow in number. In 1999, the floor space of a retail outlet averaged 1,000 m^2, instead of 200 m^2 thirty years ago. In Italy and Spain, however, the market share of small outlets is still high. The total number of sports retail outlets and chain stores are shown below.

Chain stores are stores with the same name under central management. They stimulated the popularity and fashion for wearing sports clothing and footwear in the 1990s and these are now well represented in the high street, where shoppers tend to treat them like any other clothing store.

There are also chain stores specialised in outdoor activities, some of which offer much space (e.g. climbing wall) to extensively try out the product. Their main target group is the recreational sportsman or woman and the most popular sportswear and equipment are sold. Significant chain store retailers, who have reached a large share in their domestic market, actively operate in other EU markets. Examples are Décathlon, JJB Sports, Go Sport and Giacomelli, which have grown fast between 1997 and 1999, as is shown below.

Country	Total no.	Name of major sports chain stores (with number of outlets) of outlets
Germany	6,000	Reno (785), Runners Point (106), Voswinkel (85), Sport Haus (55), Scheck (15), Schuster
France	3,600	Décathlon (196), Go Sport (94), Courir (136), Chausports (91), Grand Bazaar, Europêche
UK	3,000	JJB Sports (475), Allsports (240), Black Leisure (185), JD Sports (130), Sports and Soccer
Italy	4,650	Giacomelli (65), Big Jim/Sport (65), Longoni (12), Hervis (11), Gerosa, Sportmarket
Spain	6,252	Décathlon (24), Sprinter (15), Side 1 (30), Calderon Sport (14), Core Core, Sport Zone
Netherlands	1,979	Aktie Sport (61), Perry Sport (38), Footlocker (38), Pro Sport (29), Olympus Sport, Bever

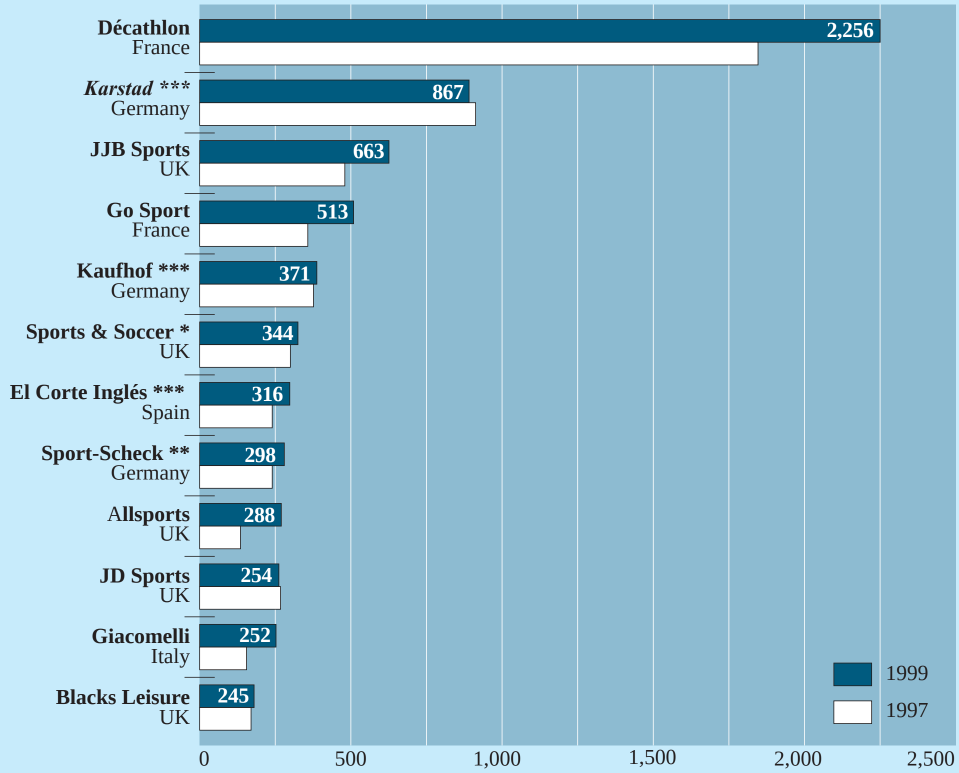
Source: Mintel/Corporate Intelligence Group (2001)

Table 7.1 Distribution channels in the selected EU markets
As per cent of retail sales of sports goods (equipment, clothing and footwear) in 1999

	Germany	France	UK	Italy	Spain	Netherlands
Specialists	**61%**	**62%**	**44%**	**60%**	**67%**	**55%**
Buying groups/franchised	37%	16%		20%	11%	32%
Independent sport shops	6%	3%	13%	28%	47%	8%
Chain stores/Multiples	17%	41%	30%	11%	8%	14%
Factory outlets	1%	2%	1%	1%	1%	1%
Non-specialists	**39%**	**38%**	**56%**	**40%**	**33%**	**45%**
Clothing/variety stores	4%	11%	15%	12%	8%	13%
Shoe shops	8%	3%	10%	8%	7%	8%
Department stores	16%	6%	8%	4%	9%	10%
Hypermarket/discounters	8%	12%	3%	6%	5%	
Mail order/direct sales	3%	6%	20%	10%	4%	14%

Source: Mintel, VDS, FPS, IBS, HBD, AFYDAD, Retail Intelligence (2000)

Figure 7.3 Major chain and department stores selling sports goods in the EU, 1997 - 1999
Sales value in US$ million



*NOTE: * Member of Sport 2000*
*** Member of Intersport*
**** Department store*

Source: SRE (2000)

Independent sports shops are distinguished into two categories, both having different product mixes:

- *Single sport shop*, which sells mostly equipment. However, nowadays they also stock clothing to attract customers. This type of shop is fairly common for golf *(pro-shops)*, horse riding, tennis, snow sports, skateboards and includes *clubs shops* (football replica kits and fitness goods).
- *Fashionable sports shops*, which have an emphasis on branded sports clothing and footwear. Due to changes in the sports goods market, some of these shops have been forced to sell more sportswear than equipment, while others have reduced their risks by becoming members of a buying group.

Fishing tackle shops also fall into the single sports shop category. In 1999, fishing tackle was sold in around 9,600 specialised outlets in the selected EU countries. Other important outlets for fishing tackle include sports chain stores, DIY stores, direct mail and e-commerce.

Franchised stores are more common in France. Recently they have chosen for more specialisation in one particular field of sports e.g. sliding sports (e.g. Quai 34) or fishing (Europêche with 133 outlets).

Factory outlets sell out of date articles from importers to consumers at low prices (e.g. Nike, Adidas, Puma).

Single brand stores (e.g. Quicksilver, O'Neill) sell the complete article range of one particular brand.
They are meant to create/improve their brand image, instead of offering articles at low prices.
These two forms of ***'vertical integration'*** grow in importance in all selected countries. They remove the need for retailers and are threatening other specialised sports goods retailers.

Retailers - Non-specialised outlets

The success of chain stores stimulated the total sports goods market, which attracted the attention of non-specialised outlets like department stores, hypermarkets and discounters. The increased sales made by all these outlets in the past few years illustrate the trend for sportswear to be increasingly worn as leisurewear.
They started to sell sports footwear, particularly fast moving items, followed by trainers, replica kits, other popular sports clothing and some sports equipment (fitness, camping). In 1999, non-specialist retailers accounted for almost 40% of sports goods sales, as shown in table 7.1.

Department stores have been important in the sports goods market by selling sports equipment and, more recently, sportswear. The German Karstadt (473 stores), Kaufhof (129) and the Spanish El Corte Inglés (67) were leaders in EU sports goods market, as is shown in figure 7.3. They have sportswear departments and concessions in their stores, including their own brand. Department stores in other countries e.g. Galeries Lafayette (France), Debenhams (UK), Coin (Italy) and V&D (The Netherlands) also carry a wide range of sports goods.

Hypermarkets, supermarkets and discounters have grown in importance. They had a major influence on the increased price competition in the whole sports goods market, with discounters selling at low prices. Like most department stores, they concentrate on fast-moving sport goods and seasonal items, which are 'hot' and require minimal advice and service. Some large retail organisations like Carrefour (France), Metro and Aldi (Germany), who produce their own sports goods (mostly sportswear), are integrating manufacturing with mainstream fashion retailing to increase their profit margins.

Mail order increased its market share in sports goods sales in most countries. Catalogues are more fashion focussed and offer the leading brands of sportswear and some sports equipment (outdoor, fitness, golf). Fitness equipment is also sold through television from US manufacturers. In the selected countries, major mail order companies include the German Otto, Neckermann, Quelle and the French Trois Suisses, Camif and La Redoute. The mail order business is now gradually shifting to e-commerce.

E-commerce is growing slowly. Most mail order companies, large retailers and importers have created Internet sites for sportswear and equipment.
With technological improvements such as interactive TV and the consequent increasing number of consumers who know exactly what they want but have little time to go shopping, this sales channel is likely to grow. However, there are still many consumers who prefer to be able to touch and try out items before they buy and are suspicious about giving their credit card number. In the year 2003, it is estimated that Germany will have 30 million Internet users, while France should have 18 million users, Italy 10 million and Spain 8 million.

Trends in sports goods retailing

- ***Differentiation, co-operation or concentration*** will be crucial in order to compete with the large retail organisations. Retailers can choose between 'broadening assortment' and become bigger by mergers or take-overs or become 'super specialist' in a sport or area.
- ***Information technology*** systems will be an essential tool for all sport shops to improve stock control, order processing, their knowledge about their 'changeable' customers and to develop their loyalty.
- ***Changes in consumer's shopping behaviour,*** which was brought about by flexible working hours and the desire to spend free time more efficiently. In general, two types of consumers can be distinguished:
  - People who buy goods (clothing, shoes) when doing their other daily shopping, the 'recreational sporters/shoppers'. They make the decisions by themselves and they want to find the article/brand very quickly in the shop, often a sports chain store, hypermarket or department store.
  - People starting a new sport, who are much more serious and who are willing to spend more time on shopping, which are the more 'serious sporters/shoppers'. They expect expertise, good advice and after sales service from the sales staff of the sports speciality shop.

7.2 Distribution channels for developing country exporters

In the case of subcontracting, the EU manufacturer/supplier is taking care of the distribution of the goods. However, it is recommended to exporters to have an idea of the various channels and their characteristics in supply, which may offer prospects for a direct contact with importers or retailers in the future. Especially large EU retailers (e.g. Decathlon, JJB Sports) look for new sources to have their private labels produced.

Distribution channels in the selected markets within the EU are different and each market has its own preferred distribution system. For example, The UK has a diversified system, with chain stores and mail order leading the sales of sports goods. France's distribution is characterised by the presence of many franchised stores. German distribution is divided into eight 'Nielsen' areas and, in order to cover the whole market, it is necessary to have a wholesaler in each area.
For the geographically small and compact Dutch market, one importer-wholesaler can handle national distribution very effectively. Distribution in the southern markets of Italy and Spain is far more fragmented than in the north.
Taking these differences into consideration, the following channels provide the safest and most effective method of distribution for exporters from developing countries:

- Distribution by use of an importer in each country
- Distribution through department stores, chain stores and buying groups
- Distribution through mail order

Distribution by an importer:

Advantages	→	Volume orders against guaranteed payment.
	→	No risk of unsold stock.
	→	Travel costs can be divided when visiting more than one importer.
	→	If working relationship is successful, more business will follow.
Disadvantages	→	Exporters receive a relatively small proportion of the final consumer price.
	→	Importers may require exclusivity in the sale of the item.

Distribution through department stores, chain stores and buying groups:

Advantages	→	Items can be sold at a higher price than to importers.
	→	Production of the item starts only after receipt of the order.
	→	Payments are more secure, because L/Cs or similar methods are used.
Disadvantages	→	It is hard to establish a relationship with buyers, because they often change.
	→	It is difficult to get in touch with buyers, who are always very busy.
	→	Special conditions are required in labelling, packaging or pre-packing assortments for individual chain store members.
	→	In the case of bad performance, late delivery or wrong follow up of instructions by the exporter, buyers will make claims or cancel the order.

Distribution by home direct channels

Advantages	→	Volume orders which are fixed.
	→	Items can be sold at a higher price than to importers.
	→	Publicity for the items sold in their catalogues or other media is free.
Disadvantages	→	These companies may require exclusivity in the sale of the item.
	→	They often order items instead of product lines.
	→	Exporters are required to keep the ordered items in stock when offered for sale, at their own risk.

It is important to note that, by selecting one trade channel, other channels are often automatically excluded. One cannot have a relationship with a department or chain store while at the same time entering the market with the same line of products through an importer. This is often unacceptable to trade partners and will definitely have an adverse effect on export operations.

Fair Trade organisations or *Oxfam* could be another possibility for exporters. These NGOs operate on an idealistic basis for the benefit of farmers, co-operatives and exporters from developing countries by assisting them to sell their products in EU countries. For example, in The Netherlands, the Fair Trade organisation has 6 shops and also supplies to 300 'Wereldwinkels' (Third World Shops) in the country. All of these shops sell products from developing countries ranging from food, clothing to handicrafts. Recently they started to sell some sports articles e.g. footballs and volleyballs.

The Fair Trade organisation buy only products, which are made under humane and acceptable working conditions (they employ no child labour, for example) and for which a 'fair' price is being paid.

Promotion

Importers, agents, retailers and other buyers travel extensively to international trade fairs to view new products, to decide upon suitable ranges for their market and to keep up with the latest changes in sports, sports equipment, product performance and design, fashions, materials and colours.

The ISPO in Munich (Germany), MIDO in Milan (Italy), 40° (United Kingdom) in London and Glissexpo in Paris (France) are the most important fairs for sports and camping goods in the EU.
The ISPO (Munich) is the leading fair for sports goods, which is held twice a year (summer and winter) with around 40,000 visitors and 1,600 exhibitors at each fair.

The Glissexpo (Paris) is focussed on gliding sports (e.g. snow sports, waterskiing, skateboarding, paragliding etc.), with around 13,000 visitors and 200 exhibitors, which is also held twice a year. Other large specialised fairs include the European Outdoor in Friedrichhafen (Germany) and Golf Europe in Munich (Germany).
A list of the most important European sports goods trade fairs can be found in EU Strategic Marketing Guide 'Sports and camping goods' (2001), section 2.2.1. Addresses of trade fair organisers of the most important fairs in the selected EU markets can be found in this survey in Appendix 6.

There is a permanent exhibition at the Sports Business Center in Leusden which plays an important role in the trade in sports and camping goods in The Netherlands. Here the most important importers and wholesalers have showrooms in the centre and special fairs are organised for the retail trade twice a year.
The National Spring Preview Fair in January is more focussed on winter sports (equipment, clothing and footwear), whereas the National Autumn Fair in September gives a preview to the new collections for summer sports. The Sports Business Center also organises specialised national fairs like the Spocom (focussed on snowsports), Outdoor Holland and Get-In-Line (skating and gliding sports).

The centre is open every working day and retailers can order new merchandise for their shops. Every Monday the representatives of each sales company are present. For the exporter, a visit to the centre can give a good impression of what is currently selling on the Dutch market. Especially northern EU countries have similar permanent exhibitions.

8 PRICES AND MARGINS

8.1 Prices and margins

Prices

In general, EU prices of sports and camping goods have declined in recent years and are competitive compared to those in the USA and Asia. In principle, the importers control fairly closely the recommended retail prices, but parallel imports, an oversupply of goods and the growing success of discounters have seriously disturbed the situation. Price cutting and early clearance sales have become regular features of the trade. Moreover, competition between stores has intensified because of the excessive number of outlets where sports goods were sold.

In addition, large retailers, who benefit from large economies of scale and increased efficiency, are in a position to exert even more pressure on prices and margins. This means that price remains an important factor in the low-end market segment. Some retail prices are given in the table below.

It is vital that promising new products from exporters of developing countries offer extra value. A new product can be of interest to a buyer either because it is a unique product or is a novelty, or because it could appeal to a particular market segment, in which case the price is of secondary importance.

Table 8.1 Retail prices of selected sports goods in The Netherlands, 2001

Product	Main Brands	Retail price in US$ (incl. 19% VAT)
Skis	Elan, Salomon, Atomic, Head, Völkl	225 - 450
Snow boards	Nidecker, Salomon, Elan, Nitro	315 - 450
Rackets (tennis)	Dunlop, Slazenger, Head, Prince, Wilson	32 - 170
Rackets (squash)	Slazenger, Prince, Wilson, Head	45 - 110
Rackets (badminton)	Carlton, Yonex	20 - 90
Squash and tennis balls	Penn, Dunlop, Slazenger, Tretorn	4 - 15
Table tennis bats	Sunflex, Stiga	5 - 15
Golf clubs (irons and woods)	Howson, Wilson	225 - 315
Golf bags	Wilson	55 - 70
Hockeysticks	Grays, Dita, Stag	20 - 90
Hockeyballs	Dita	4 - 6
Footballs	Derbystar, Adidas, Nike	11 - 32
Volleyballs	Rucanor, Nike	18 - 30
Basket balls	Spalding, Nike	17 - 30
Ice-skates	Viking, Zandstra, Roces, Bauer	50 - 110
In-line skates	Roces, Rollerblade, Bauer, Technica	90 - 180
Skateboards	CalPro, Killerloop	50 - 70
Scooters	RSI, Spex	90 - 150
Fitness excercise bikes	Kettler, Tunturi	180 - 270
Fitness power training equipment	Kettler, Tunturi	200 - 900
Dumbbells, small halters, squeezers	Kettler, INQ (Private brand)	6 - 12
Goggles, snorkel set (watersports)	Speedo, Seac, Salvas	6 - 30
Sleeping bags	Wildebeast, Nomad, private brands	40 - 200
Tents	Wildebeast, Azimut, Jamet	90 - 350
Fishing rods	Peerless, Sheakspeare, Silstar	40 - 110
Fishing reels	Shimano, Daiwa, private brands	20 - 60

Source: Store checks (Perry Sport, Daka Sport and 2 specialist shops) July 2001

Changeover to the Euro (€)

The rate at which retailers in the EU are preparing themselves for the changeover from their national currency to the Euro (€) is too slow. In July 2001, there were still large and many smaller companies (SMEs), who postpone the switch to the end of 2001. For them the changeover of IT (Information Technology) systems should be realised in a few months only. A number of companies may be unable to meet the legal deadline of 1 January 2002.

Margins

In 2001 the average gross profit retail margin in sports goods was 35%. This margin is measured over the annual sales turnover. It includes the seasonal sell-out periods and is calculated without VAT.

In general, margins of large organised shops are higher than those of smaller shops, with the exception of highly specialised shops (e.g. golf pro shops). Chain stores and megastores are often at expensive locations, carry a wide assortment and have many sales staff, which is reflected in higher margin.

Because of these differences, retail markups for sports and camping goods vary from 60% to 130%, the average is about 100%. This mark-up includes value-added tax (VAT), which ranges from 16 to 21% on sports and camping goods, varying within the selected EU markets. Actual margins can vary widely around these averages depending on the exclusivity of the product, the level of demand and the type of store through which items are sold.

In a similar way importer/wholesaler mark-ups average between 40 and 70%, with the margins on lower priced articles slightly higher than those on higher priced articles. The typical average commission rate for an agent is 10 to 15%. Depending on the number of parties who handle the product the net price achieved by an exporter can be multiplied by a factor of 3 - 4 times. An example of a calculation of the final consumer price of sports and camping goods is given below. In this case, an importer or wholesaler handle the product.

8.2 Sources of price information

The best way to obtain information about prices and price levels in the EU is by visiting one of the major trade fairs or permanent trade fairs. Alternatively, comparisons can be found in the prices given in catalogues from sports chain stores, mail order houses, department stores or from company web sites. Window-shopping in the prospective market place, at several retail shops, is another good way of getting information about prices, fashions, colours, qualities and promotions. Important sources of price information on sports and camping goods are listed next page. The addresses can be found in Appendix 4.

Calculation of final consumer price	**Low Margin**	**High Margin**
Export price (FOB)	***100***	***100***
Import duties*	3	3
Other cost (e.g. transport, insurance, banking services)	3	3
Landed cost price (CIF)	*106*	*106*
Importer's/wholesalers mark up (e.g. low: 40%, high 70%)	42	74
Importer's/wholesaler's selling price	*148*	*180*
Retailer's mark up including VAT (e.g. 19%) (e.g. 100% in both cases)	148	148
Final consumer or retail price	**296**	**328**
Ratio FOB - Consumer price	***3.0***	***3.3***

** If the GSP tariff is applicable for your country, the import duty can be reduced to zero, see EU Strategic Marketing Guide 'Sports and camping goods' (2001), section 1.2.*

WFSGI - World Federation of Sports Goods Industry	→	Major issues and worldwide trends in prices of sports goods *www.wfsgi.org*
EFTTA - EU Fishing TackleTrade Association	→	Major issues in prices of fishing tackle in the EU *www.martex.co.uk/eftta*
Sport-Scheck	→	Web site of German large chain store of sports goods *www.sportscheck.com*
JJB Sports	→	Web site of UK large chain store of sports goods *www.jjb.com*
Perry Sport	→	Web site of Dutch chain store of sports goods *www.perrysport.nl*

9 OPPORTUNITIES FOR EXPORTERS

This chapter gives the main opportunities for exporters from developing countries and is meant to serve as a basis for the EU Strategic Marketing Guide "Sports and camping goods" (2001).

Sports participation

The emphasis in sports participation will be less on the competitive team sports and more on *leisure and individual sporting activities.* Interest in these activities is motivated more by the desire for personal health and beauty, informal social contact or relaxation than by achieving results. These activities are less demanding in terms of time commitments and suit today's individual lifestyle. By the year 2020, the proportion of 45+ olds in the population of most selected EU countries is expected to be more than 40% of their total. These older people want to stay in good health in doing a form of fitness, outdoor activity, golf, water or snow sports.

For young people, the growing sports are adventurous outdoor activities, water, gliding, street sports, climbing and horseriding. In general, young people are more aware of brands and the latest trends in sports, especially when associated with a celebrity or music style. Recently they change the sports in which they participate more frequently (i.e. 'zapping sports').

A slower growing sports goods market:

The developments in sports participation will stimulate the market for camping goods (including outdoor equipment), but also for equipment for golf, fitness (weights, dumbells, in-home trainers), watersports and gliding sports. In addition, the future sports goods market is likely to be stimulated by:

- ***Travel*** in own country, which may have a positive effect on the sale of camping goods, trekking and watersports equipment (swimming, snorkelling or diving gear).
- ***Increased sales of sports goods to women and children,*** where design in products is most important.
- ***New technological improvements*** in sports equipment for example by improved material, comfort in playing, product safety (e.g. in carve skis) and intelligence in equipment.
- ***A more 'professional' styling*** in equipment is favoured by people in southern EU countries.
- ***The ethnic minority population,*** which is likely to become a growing market for sports goods.

These developments offer opportunities for *equipment* and *accessories* in these sports. For exporters, the lower to medium price range market segment may offer good opportunities.

Sub-contracting or strategic alliances:

Some EU manufacturers/suppliers look for new low-cost countries to outsource production of high volume items, while others look for exclusive items to meet the increasing diversity in demand in their country. Both cases offer prospects for new suppliers or partners, who could also be exporters from developing countries. The EU sports goods industry has been threatened by enormous price competition from large supplying countries like China and Taiwan. Consequently, the EU industry now concentrates on the marketing of the goods and are constantly looking for new partners, producing their brands or private labels, with whom they can form a strategic alliance. Inputs in terms of design and material are often made by the EU company.

Threats and difficulties for exporters:

→ The sports article should be well finished, exactly made according to importers' specifications, and meet the quality requirements of the demanding EU market, where strict safety standards are often required.

→ Production capacity, keen pricing and fast delivery are needed to establish reliable relationships withimporters or other buyers. Good communication (e-mail and personal contact) and flexibility are vital.

→ 'Zapping sports', makes it difficult to start a long-term investment based on the current market situation.

→ The increased requirement from EU importers and the industry to supply articles "Just In Time" (JIT). The JIT system requires extremely quick delivery, which means that exporters who are not close to their customers must keep more items in stock.

APPENDIX 1 HS CODES - SPORTS AND CAMPING GOODS

HS Code	Product description
9506	**Sports goods** Articles and equipment for general physical exercise, gymnastics, athletics, other sports (including table-tennis) or outdoor games, not specified or included elsewhere in this chapter; swimming pools and wading pools; parts and accessories thereof.

Sports Equipment

Snowsports	
950611	Skis for winter sports
9506.1110	Cross country skis
9506.1190	Skis for ski jumping and alpine skiing
950612	Ski bindings
950619	Ski equipment for winter sports (other then skis and ski fastenings and bindings)
9506.1910	Ski sticks
9506.1990	Ski equipment for winter sports (excl. skis, bindings and ski sticks)
Watersports	
95062	Sailboards and parts and accessories thereof
950629	Waterskis, surfboards, sailboards and other water-sport equipment; parts and accessories thereof:
9506.2910	Water skis
9506.2990	Surfboards and other water-sport equipment (excl. sailboards and water skis)
890310	Inflatable vessels for pleasure or sports
Golf	
950631	Golf clubs, complete
950632	Golf balls
950639	Golf equipment (other)
9506.3910	Parts of golf clubs
9506.3990	Golf equipment (excl. balls, clubs and parts thereof)
Table tennis	
950640	Articles and equipment for table-tennis
9506.4010	Bats, balls and nets for table tennis
9506.4090	Articles and equipment for table tennis
Rackets	
950651	Tennis rackets, whether or not strung
950659	Badminton and similar rackets, whether or not strung
9506.5910	Badminton rackets, whether or not strung
9506.5990	Squash or similar rackets, whether or not strung
Balls	
950661	Tennis balls
950662	Inflatable balls
9506.6210	Inflatable leather balls
9506.624080	Soccer balls
9506.628020	Basketballs
9506.6290	Inflatable balls (excl. of leather)
950669	Other balls
9506.6910	Cricket and polo balls
9506.6920	Baseballs and softballs

continued

continue

Skates	
950670	Ice skates and roller skates, including skating boots with skates and rollers attached; parts and accessories thereof
9506.7010	Ice skates incl. skate boots with skates attached
9506.7030	Roller skates incl. Skate boots with rollers attached
9506.7090	Parts and accessories for ice skates and roller skates
Fitness/gym	
950691	Articles and equipment for general physical exercise, gymnastics or athletics, other sports, incl. Table tennis or outdoor games, swimming pools and padding pools
Outdoor sports (including Teamsports)	
950699	Articles and equipment for sport and outdoor games, swimming and padding pools
9506.9910	Cricket and polo equipment
9506.991500	Baseball articles and equipment except balls, and parts and accessories
9506.992500	Ice-hockey and field-hockey articles and equipment, except balls and skates and parts
9506.994700	Snowshoes; sleds, bobsleds, toboggans, and the like and parts thereof
9506.9990	Other articles and equipment for sport and outdoor games, swimming and padding pools

Camping goods (including equipment for outdoor activities)

630621	Tents of cotton
630622	Tents of synthetic fibres
630623	Tents of textile materials
630641	Pneumatic mattresses of cotton
630649	Pneumatic mattresses of textile materials
630691	Camping goods of cotton (excl. tents, awnings and sunblinds, sails, pneumatic mattresses, rucksacks, knapsacks and similar receptacles, filled sleeping bags, mattresses and cushions)
630699	Camping goods of textile materials (excl. of cotton, tents, awnings and sunblinds, sails, pneumatic mattresses, rucksacks, knapsacks and similar receptacles, filled sleeping bags, mattresses and cushions)
940430	Sleeping bags, whether or not electrically heated
9404.3010	Sleeping bags, whether or not electrically heated, filled with feathers or dawn
9404.3090	Sleeping bags, whether or not electrically heated, excl. filled with feathers or dawn

Fishing tackle

9507	Fishing rods, fish-hooks and other line fishing tackle; fish landing nets, butterfly nets and similar nets; decoy “birds” (other than those of heading 9208 or 9705) and similar hunting or shooting equipment; parts and accessories thereof
950710	Fishing rods
950720	Fish-hooks, whether or not snelled
9507.2010	Fish-hooks, whether or not snelled, unmounted
9707.2090	Fish-hooks, whether or not snelled, mounted
950730	Fishing reels
950790	Line fishing tackle, fish landing nets, butterfly nets and similar nets; decoys and similar hunting or shooting requisites

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

This section gives Eurostat statistics covering the imports and exports of the EU, the selected markets within the EU. Also, import statistics of the selected product groups are given. All export statistics can be found at the end of this section.

With regard to *outdoor sports*, it should be noted that this refers to all equipment for athletics and other field sports. Equipment for recreational *outdoor activities* like hiking or climbing equipment are not included in this category, but in the *camping goods* group.

Although in this market survey, the US$ is the basic currency unit used to indicate value, in these Eurostat statistics the values for dates after 1 January 1999 are also expressed in €. In 1999, the €/US$ exchange rate was US$ 1,06 for one €.

EUROPEAN UNION - TOTAL IMPORTS

EU imports of sports goods by product group detailed, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**4,021,233**	**499,841**	**4,013,902**	**522,997**	**3,870,211**	**3651,143**	**586,516**
Intra-EU	1,489,601	140,158	1,501,275	151,178	1,469,528	1,386,347	174,699
Extra-EU	2,531,632	359,683	2,512,627	371,819	2,400,683	2,264,796	411,817
Developing countries	1,601,081	270,618	1,576,296	288,371	1,505,726	1,420,496	319,652
Skis	228,402	8,649	211,055	7,810	211,471	199,501	8,463
Ski bindings	92,963	4,702	103,510	5,944	97,367	91,856	6,057
Ski equipment	69,602	4,101	57,696	3,540	68,797	64,903	5,068
Ski boots	24,074	1,254	27,954	1,601	18,535	17,486	928
Sailboards	57,557	1,803	56,794	2,243	58,319	55,018	2,038
Waterskis, surfboards	138,576	11,435	141,902	11,450	141,348	133,347	12,897
Inflatable vessels	53,739	5,625	56,681	6,574	60,754	57,315	7,652
Golf clubs	196,948	2,668	248,690	3,573	225,997	213,205	3,684
Golf balls	74,629	6,214	79,464	6,423	89,211	84,161	7,464
Other golf equipment	119,406	5,740	122,218	5,684	113,056	106,657	5,774
Table tennis	43,125	7,745	39,474	7,369	35,235	33,241	6,678
Tennis rackets	111,124	3,478	109,418	3,637	104,659	98,735	3,749
Badminton/squash rackets	68,550	5,482	62,075	5,476	56,541	53,341	5,701
Tennis balls	50,969	5,893	52,371	5,972	45,832	43,238	5,339
Inflatable balls	203,411	23,192	232,015	26,911	180,272	170,068	22,013
Other balls	42,134	5,419	47,840	6,164	42,074	39,692	7,499
Ice skates	70,691	6,183	62,066	5,278	35,964	33,928	2,939
Roller/in-line skates	383,641	40,820	284,006	29,663	279,607	263,780	34,020
Parts for skates	63,139	4,173	47,742	4,060	26264	24,777	2,331
Fitness/gym	549,252	152,863	564,243	167,599	607,248	572,875	188,161
Cricket/polo equipment	4,664	810	4,822	778	4,499	4,244	731
Outdoor sports/Team sports	622,319	112,823	613,865	117,944	621,423	586,248	126,678
Tents (cotton)	35,856	5,633	31,293	4,238	24,840	23,434	4,120
Tents (synthetic fibres)	153,839	21,215	172,805	25,262	171,422	161,719	31,286
Tents (textile)	26,478	3,883	22,915	3,106	19,969	18,839	4,529
Air mattresses (cotton)	16,055	5,367	13,643	4,448	10,013	9,446	3,876
Air mattresses (textile)	11,221	2,627	13,458	3,050	15,152	14,294	4,158
Misc. camping (cotton)	8,182	1,577	7,556	1,566	8,705	8,212	1,997
Misc. camping (textile)	45,035	13,003	52,966	16,208	58,642	55,323	21,082
Sleeping bags	87,928	9,737	97,498	12,895	101,365	95,627	12,080
Fishing rods	123,438	4,538	130,660	4,795	104,916	98,977	4,643
Fishing hooks	34,429	1,140	34,572	1,220	29,711	28,029	2,082
Fishing reels	84,936	3,088	81,468	3,240	74,793	70,559	3,415
Fishing lines	148,994	8,215	157,120	8,877	144,747	136,554	8,312

Source: Eurostat (2001

EU imports of sports goods by source, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**4,021,233**	**499,841**	**4,013,902**	**522,997**	**3,870,211**	**3,651,143**	**586,516**
Intra-EU	1,489,601	140,158	1,501,275	151,178	1,469,528	1,386,347	174,699
Extra-EU	2,531,632	359,683	2,512,627	371,819	2,400,683	2,264,796	411,817
Developing countries	1,601,081	270,618	1,576,296	288,371	1,505,726	1,420,496	319,652
Main countries of origin							
China	852,706	162,697	853,225	172,578	831,653	784,578	203,329
USA	555,341	37,056	567,728	34,304	528,411	498,501	30,637
Taiwan	314,811	64,534	299,657	73,096	290,847	274,384	80,717
Italy	283,297	24,762	257,612	26,933	253,761	239,397	48,687
France	222,924	21,949	237,970	101,608	231,454	218,353	25,436
Germany	215,693	24,364	218,904	23,541	223,612	210,955	23,489
Austria	153,583	7,842	125,654	6,423	133,898	126,319	6,710
United Kingdom	103,580	9,372	104,530	10,648	119,995	113,203	8,545
Netherlands	78,560	9,300	91,339	10,546	105,510	99,538	11,715
Belgium/Lux	73,375	10,410	95,212	12,454	101,026	95,308	14,377
Pakistan	92,499	10,571	107,735	12,381	78,362	73,926	8,810
Spain	46,296	7,056	56,779	7,897	62,392	58,860	8,160
Thailand	45,666	6,245	36,441	4,574	52,175	49,222	5,216
Canada	60,721	15,455	46,984	13,925	50,070	47,236	14,464
Czech Rep.	55,452	7,033	49,322	6,126	47,060	44,396	5,955
Sweden	27,993	4,898	31,686	4,862	40,497	38,205	6,286
Japan	62,212	6,496	51,403	5,705	48,211	45,482	3,135
Hong Kong	23,042	4,796	23,904	3,792	31,693	29,899	4,773
Finland	26,275	3,422	27,139	3,138	30,835	29,090	4,602
Switzerland	29,290	1,443	27,014	1,350	30,152	28,445	1,265
Denmark	22,636	2,629	23,579	2,561	26,891	25,369	3,013
Ireland	27,093	4,451	24,273	4,937	25,316	23,883	3,687
South Korea	35,759	5,767	26,950	4,328	24,500	23,113	4,633
India	25,766	4,015	29,169	4,663	23,980	22,623	3,399

Source: Eurostat 2001

IMPORTS BY THE SELECTED MARKETS WITHIN THE EU

German imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**951,604**	**121,986**	**832,561**	**122,117**	**761,607**	**718,497**	**135,182**
Intra-EU	277,860	23,915	220,918	20,450	188,699	178,018	20,023
Extra-EU	653,403	98,071	611,643	101,667	572,908	540,479	115,159
Developing countries	460,555	77,630	421,376	81,205	394,504	372,174	92,346
Fitness/gym	126,742	37,366	134,648	42,959	131,899	124,433	50,379
Skates	195,293	16,665	136,054	12,489	110,076	103,845	11,705
Outdoor sports/Team sports	119,225	23,278	109,108	23,595	100,989	95,273	23,843
Snowsports	89,181	4,408	79,965	4,291	64,416	60,770	3,624
Watersports	57,207	4,064	48,413	3,466	50,863	47,984	4,066
Golf	48,588	837	54,120	1,172	47,941	45,227	1,171
Balls	66,271	7,163	65,317	6,929	45,796	43,204	5,329
Rackets	36,437	2,205	23,759	1,421	25,342	23,908	1,895
Table tennis	8,458	757	9,698	944	7,063	6,663	697
Camping goods	111,435	22,002	108,808	21,976	121,111	114,256	29,638
Fishing tackle	72,426	3,241	62,672	2,875	56,110	52,934	2,835

Source: Eurostat (2001)

UK imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**667,740**	**87,800**	**727,928**	**95,080**	**702,860**	**663,075**	**90,912**
Intra-EU	119,409	15,451	140,239	23,888	123,169	116,197	15,885
Extra-EU	548,330	72,349	587,690	72,192	579,691	546,878	75,027
Developing countries	290,862	49,941	286,530	50,130	282,077	266,110	52,098
Golf	183,214	8,094	232,104	8,678	249,584	235,457	9,568
Fitness/gym	134,091	37,454	131,652	36,307	129,931	122,576	36,549
Balls	40,142	5,314	50,777	6,753	44,394	41,881	6,868
Watersports	29,925	2,624	34,094	2,829	30,442	28,719	2,250
Skates	51,215	6,002	32,798	4,276	18,358	17,319	2,659
Rackets	21,293	1,076	18,331	976	16,519	15,584	945
Table tennis	3,843	1,005	3,362	1,024	3,073	2,899	898
Snowsports	8,824	280	7,256	192	11,606	10,949	350
Outdoor sports/Team sports	87,673	16,847	102,757	20,986	93,462	88,172	18,777
Camping goods	54,988	7,112	63,373	10,697	58,545	55,231	9,864
Fishing tackle	52,531	1,992	51,424	2,362	46,945	44,288	2,184

Source: Eurostat (2001)

French imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**618,302**	**76,521**	**646,684**	**80,927**	**645,500**	**608,962**	**94,452**
Intra-EU	302,386	31,206	337,049	34,914	359,906	339,534	39,209
Extra-EU	315,916	45,315	309,634	46,013	285,594	269,428	55,243
Developing countries	226,848	35,555	221,012	37,899	203,827	192,290	45,393
Snowsports	60,316	2,953	60,599	2,999	70,175	66,203	4,228
Watersports	62,557	4,728	68,182	5,449	70,065	66,099	6,778
Skates	72,710	8,203	61,732	6,975	68,737	64,846	6,729
Fitness/gym	44,792	14,486	47,225	15,490	63,500	59,906	21,830
Rackets	29,316	1,530	31,939	1,895	33,168	31,291	2,227
Balls	44,449	5,196	56,183	7,142	41,562	39,209	5,043
Golf	32,325	1,140	35,580	1,124	28,140	26,547	1,130
Table tennis 1	5,250	3,004	11,381	2,400	10,575	9,976	1,802
Outdoor sports/Team sports	125,493	22,239	124,416	21,562	127,033	119,842	25,395
Camping goods	57,218	9,544	62,906	11,829	59,892	56,502	15,284
Fishing tackle	73,877	3,498	86,540	4,062	72,653	68,541	4,006

Source: Eurostat (2001

Italian imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**349,950**	**35,626**	**339,263**	**35,605**	**331,182**	**312,436**	**41,513**
Intra-EU	166,058	10,720	170,989	10,496	169,742	160,134	11,221
Extra-EU	183,892	24,906	168,273	25,109	161,440	152,302	30,292
Developing countries	122,309	19,661	121,678	20,692	116,236	109,657	24,860
Snowsports	89,667	3,332	86,567	3,219	85,135	80,316	3,386
Watersports	16,668	1,218	21,587	1,647	25,273	23,842	2,543
Fitness/gym	25,359	7,975	25,929	8,620	29,411	27,746	10,522
Balls	29,078	3,091	28,442	3,076	26,175	24,693	3,192
Skates	43,863	4,885	22,655	2,576	24,343	22,965	3,340
Rackets	16,532	623	16,393	602	14,012	13,219	618
Golf	11,912	278	12,505	308	10,324	9,740	401
Table tennis	2,737	616	2,454	593	2,220	2,094	589
Outdoor sports/Team sports	55,993	10,178	57,593	10,686	59,780	56,396	11,933
Camping goods	15,140	2,170	16,877	2,716	17,880	16,868	3,580
Fishing tackle	43,001	1,260	48,260	1,562	36,630	34,557	1,409

Source: Eurostat (2001)

Spanish imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**199,813**	**25,794**	**200,428**	**26,991**	**201,341**	**189,944**	**29,416**
Intra-EU	81,090	6,918	87,515	7,669	91,062	85,908	9,184
Extra-EU	118,723	18,876	112,914	19,311	110,278	104,036	20,232
Developing countries	88,890	17,475	84,128	17,700	82,709	78,027	18,552
Fitness/gym	26,136	9,032	27,708	9,996	30,699	28,961	11,109
Balls	24,092	2,947	26,439	3,059	21,182	19,983	2,677
Golf	19,185	376	20,739	535	20,969	19,782	455
Watersports	15,730	1,372	17,662	1,505	17,785	16,778	1,912
Snowsports	13,400	528	13,765	589	15,771	14,878	909
Rackets	12,383	694	11,535	590	10,359	9,773	501
Skates	13,641	1,954	7,407	1,030	7,254	6,843	1,222
Table tennis	1,646	238	1,434	201	1,414	1,334	292
Outdoor sports/Team sports	28,849	4,504	30,040	5,420	36,815	34,731	6,024
Camping goods	14,731	2,595	14,682	2,533	14,010	13,217	2,744
Fishing tackle	30,022	1,554	29,019	1,522	25,084	23,664	1,571

Source: Eurostat (2001)

Netherlands imports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**283,761**	**41,091**	**284,702**	**43,996**	**283,861**	**267,793**	**48,398**
Intra-EU	81,170	10,776	82,145	10,508	81,915	77,278	11,097
Extra-EU	202,591	30,315	202,556	33,488	201,946	190,515	37,301
Developing countries	113,571	18,146	122,692	22,232	122,278	115,357	24,864
Fitness/gym	43,856	10,461	45,659	13,050	49,904	47,079	14,420
Outdoor sports/Team sports	48,856	8,874	46,694	9,741	45,472	42,898	11,002
Skates	34,153	4,447	26,881	3,061	39,191	36,973	4,189
Balls	25,811	3,838	29,403	3,890	21,988	20,743	3,645
Watersports	15,829	1,449	17,008	1,437	17,099	16,131	1,479
Rackets	23,383	1,110	22,032	1,216	14,047	13,252	1,116
Golf	11,349	711	11,644	708	10,282	9,700	714
Snowsports	7,266	366	6,281	291	7,558	7,130	307
Table tennis	1,575	337	2,287	535	2,234	2,108	641
Camping goods	49,475	7,904	55,427	8,603	52,847	49,856	9,387
Fishing tackle	22,208	1,594	21,386	1,464	23,238	21,923	1,498

Source: Eurostat (2001)

EU IMPORTS OF SELECTED PRODUCT GROUPS BY SOURCE, 1997 -1999
Tonnes and US$/ € 1,000

These tables list only the most important 3 suppliers and focus on imports from developing countries.

FITNESS / GYM

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**549,252**	**152,863**	**564,243**	**167,599**	**607,248**	**572,875**	**188,161**
Intra-EU	169,004	25,950	161,884	27,286	168,646	159,100	26,626
Extra-EU	380,248	126,913	402,359	140,313	438,602	413,775	161,535
Developing countries:	244,968	101,741	259,587	114,033	281,667	265,724	131,521
Top 7 suppliers							
Taiwan	148,919	47,626	172,348	59,833	181,623	171,342	68,398
USA	104,155	13,002	109,819	14,093	110,119	103,886	11,127
China	73,105	45,592	69,206	47,256	91,850	86,651	61,456
Germany	43,888	7,130	35,165	5,366	41,000	38,679	6,327
Italy	31,127	4,082	30,978	3,984	32,244	30,419	109
Netherlands	19,248	2,776	20,241	2,563	20,688	19,517	3,241
Finland	13,033	1,257	15,297	1,556	15,260	14,396	2,058
Developing countries							
Malaysia	4,659	2,266	5,515	2,721	7,735	7,297	3,874
Thailand	7,674	2,341	3,802	1,249	3,210	3,028	1,299
South Korea	5,962	3,045	3,305	1,744	3,781	3,567	2,272
Pakistan	1,715	367	1,864	359	1,820	1,717	424
India	981	208	1,155	270	916	864	237

GOLF

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**390,982**	**14,622**	**450,372**	**15,680**	**428,264**	**404,023**	**16,922**
Intra-EU	74,595	2,521	79,154	2,477	87,429	82,480	2,899
Extra-EU	316,388	12,101	371,218	13,203	340,836	321,543	14023
Developing countries	74,033	4,701	81,598	5,526	79,192	74,709	5,868
Top 7 suppliers							
USA	230,493	6,996	272,324	7,098	255,001	240,567	7,567
United Kingdom	44,062	1,588	50,634	1,727	58,796	55,468	1,851
China	38,654	2,442	45,736	2,914	38,661	36,473	2,980
Taiwan	26,173	1,317	25,902	1,514	24,410	23,028	1,768
Japan	7,014	161	7,744	231	6,532	6,162	149
Germany	4,113	178	8,020	200	5,122	4,832	153
France	7,217	179	3,142	111	4,683	4,418	243
Developing countries							
South Korea	4,567	492	4,404	545	4,282	4,040	609
Thailand	2,119	203	2,704	250	2,089	1,971	236
Malaysia	1,173	176	869	142	854	806	163
India	269	39	520	54	707	667	89
Pakistan	111	9	805	74	447	422	20
Vietnam	99	3	324	14	300	283	9
Mexico	141	2	110	1	108	102	1

Source: Eurostat (2001)

BALLS

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**296,514**	**34,504**	**332,226**	**39,047**	**268,178**	**252,998**	**34,851**
Intra-EU	93,486	9,894	105,186	11,347	92,542	87,304	9,807
Extra-EU	203,028	24,610	227,040	27,700	175,636	165,694	25,044
Developing countries	184,244	22,159	207,983	25,604	161,707	152,554	23,148
Top 7 suppliers							
Pakistan	95,199	9,140	111,345	11,074	69,785	65,835	7,510
China	37,053	6,458	41,262	7,309	40,560	38,264	9,313
India	22,731	3,011	24,506	3,370	17,907	16,893	2,384
United Kingdom	19,097	1,852	19,747	1,940	17,072	16,106	1,706
Ireland	19,124	1,832	17,261	1,532	17,210	16,236	1,594
Belgium/Lux.	8,407	924	16,785	1,938	12,219	11,527	1,132
Netherlands	9,798	1,200	14,744	1,931	12,270	11,575	1,453
Developing countries							
Thailand	12,705	1,233	13,429	1,423	12,522	11,813	1,369
Philippines	1,962	219	3,064	377	3,258	3,074	441
Indonesia	3,378	401	2,644	300	2,194	2,070	268
Morocco	658	59	955	96	1,508	1,423	73
Mexico	451	68	784	115	323	305	54
South Korea	220	22	379	38	368	347	33
Vietnam	718	124	850	201	333	314	69

SKATES

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**517,470**	**51,176**	**393,816**	**39,001**	**341,834**	**322,485**	**59,290**
Intra-EU	139,298	10,254	126,786	9,126	117,809	111,141	31,016
Extra-EU	378,171	40,922	267,029	29,875	224,025	211,344	28,274
Developing countries	267,360	33,092	195,645	24,426	163,495	154,241	23,148
Top 7 suppliers							
China	178,193	24,429	144,965	19,683	132,077	124,601	18,870
Italy	96,000	7,110	70,651	5,490	67,197	63,393	27,871
Taiwan	46,162	4,788	26,730	2,450	17,892	16,879	1,852
France	2,991	226	11,907	678	16,169	15,254	920
Thailand	10,664	1,252	6,418	626	15,203	14,342	1,221
Belgium/Lux.	5,805	423	16,859	1,094	11,604	10,947	689
USA	42,261	2,261	24,291	1,309	11,128	10,498	864
Developing countries							
South Korea	19,335	1,017	11,422	666	5,743	5,418	377
Vietnam	3,998	595	3,487	626	2,390	2,255	472
Malaysia	4,441	676	1,369	264	1,301	1,227	321
Mexico	1,113	104	99	7	259	244	26
Philippines	193	19	71	7	236	223	21
Indonesia	66	9	170	15	146	138	22
Slovenia	2,306	151	764	59	68	64	8
Tunisia	0	0	78	15	58	55	13

Source: Eurostat (2001)

WATERSPORTS

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**249,872**	**18,863**	**255,377**	**20,267**	**260,421**	**245,680**	**22,587**
Intra-EU	132,221	7,394	127,883	7,876	125,440	118,340	8,627
Extra-EU	117,651	11,469	127,494	12,391	134,980	127,340	13,960
Developing countries	75,065	8,506	81,745	9,392	86,427	81,535	10,581
Top 7 suppliers							
China	43,793	6,247	46,777	7,055	51,540	48,623	8,470
Italy	38,379	2,332	37,905	2,645	35,557	33,544	2,772
USA	23,033	1,172	26,537	1,271	24,909	23,499	1,231
France	24,793	1,491	25,845	1,506	24,794	23,391	1,408
Germany	14,883	592	13,763	693	13,576	12,808	589
Spain	7,066	651	12,349	1,151	14,871	14,029	1,589
Thailand	6,769	303	8,503	246	13,003	12,267	381
Developing countries							
South Korea	4,963	471	4,668	465	5,019	4,735	480
Sri Lanka	4,701	149	5,146	156	4,901	4,624	167
Malaysia	999	143	2,460	200	1,993	1,880	198
Vietnam	445	81	1,595	224	1,248	1,177	185
Slovenia	617	58	1,058	114	1,748	1,649	179
South Africa	806	64	685	75	1,001	944	162
Mexico	1,305	68	637	35	236	223	27
Turkey	319	48	647	85	329	310	51
Tunisia	150	15	384	31	376	355	33

CAMPING GOODS

	1997		1998		1999		
	value US$	**volume**	**value US$**	**volume**	**value US$**	**value €**	**volume**
Total	**384,594**	**63,042**	**412,133**	**70,773**	**410,108**	**386,894**	**83,128**
Intra-EU	93,737	10,871	96,994	13,479	89,973	84,880	12,941
Extra-EU	290,857	52,171	315,139	57,294	320,135	302,014	70,187
Developing countries	244,551	46,348	259,580	50,920	263,150	248,255	62,452
Top 7 suppliers							
China	204,883	41,606	216,920	46,209	213,242	201,172	56,432
Germany	19,843	2,195	23,788	2,741	19,556	18,449	2,881
Poland	9,859	1,670	15,620	2,314	16,573	15,635	2,459
Belgium/Lux.	18,325	2,146	14,878	1,688	15,179	14,320	2,298
Czech Rep.	10,318	1,423	10,778	1,623	13,499	12,735	2,459
Denmark	12,649	980	12,104	939	12,289	11,593	1,209
Vietnam	5,784	576	6,307	549	11,528	10,875	1,402
Developing countries							
Slovenia	7,477	824	10,581	1,156	10,531	9,935	1,254
Bangladesh	3,286	296	3,502	289	2,584	2,438	308
South Korea	2,693	196	3,409	295	3,920	3,698	348
Sri Lanka	2,616	364	2,790	392	2,560	2,415	417
Indonesia	2,572	300	1,575	207	1,795	1,693	268
Malaysia	3,546	616	2,812	544	1,718	1,621	357
Tunisia	757	32	1,826	102	1,715	1,618	113
Philippines	2,055	224	1,333	133	984	928	158
Cambodia	810	139	1,628	277	318	300	55

Source: Eurostat (2001)

EUROPEAN UNION - EXPORTS

EU exports of sports goods by EU country, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**3,115,068**	**266,426**	**3,049,211**	**276,743**	**3,084,229**	**2,909,650**	**307,669**
France	620,801	41,926	602,815	43,719	648,962	612,228	50,543
Italy	582,597	50,375	528,305	46,480	554,404	523,023	52,075
Germany	408,509	43,824	411,042	44,336	394,265	371,948	44,713
Austria	452,085	18,874	417,124	17,254	387,467	365,535	18,099
United Kingdom	306,680	18,668	302,695	33,634	346,238	326,640	40,412
Netherlands	125,524	18,027	120,845	20,943	140,978	132,998	25,195
Belgium-Lux.	156,056	25,611	187,983	20,827	137,312	129,540	21,096
Spain	104,152	13,818	115,273	14,277	117,372	110,728	15,374
Sweden	111,619	10,875	118,817	10,763	114,311	107,841	12,735
Denmark	77,072	8,223	78,213	8,175	80,676	76,109	8,173
Finland	83,484	9,356	88,881	9,647	79,274	74,787	9,034
Ireland	72,236	5,361	64,542	5,612	60,218	56,809	5,281
Portugal	9,637	1,181	9,622	804	19,134	18,051	3,136
Greece	4,607	307	3,062	272	3,618	3,413	1,803

EU exports of sports goods by product group, 1997-1999 in tonnes and US$ / € 1,000

	1997		1998		1999		
	value US$	volume	value US$	volume	value US$	value €	volume
Total	**3,115,068**	**266,426**	**3,049,211**	**276,743**	**3,084,229**	**2,909,650**	**307,669**
Extra-EU	1,357,539	93,109	1,281,953	91,173	1,328,128	1,252,951	136,092
Snowsports	878,956	32,605	753,001	29,326	787,580	743,000	32,788
Watersports	242,719	12,750	259,298	13,652	260,429	245,688	14,890
Golf	177,420	5,701	183,874	14,931	223,999	211,320	30,039
Table tennis	37,345	12,761	38,606	14,388	34,562	32,606	12,949
Rackets	78,986	2,237	94,946	3,294	94,819	89,452	2,540
Balls	148,872	14,588	172,365	19,579	141,298	133,300	16,093
Skates	291,098	20,697	253,062	17,399	248,224	234,174	18,653
Fitness/gym	287,925	49,948	273,188	45,768	278,415	262,656	49,551
Outdoor sports/Team sports	515,504	87,571	542,916	90,549	550,562	519,398	101,199
Camping goods	169,650	18,290	180,918	18,276	196,781	185,642	19,374
Fishing tackle	286,592	9,278	297,039	9,581	267,559	252,414	9,593

Source: Eurostat (2001)

APPENDIX 3 STANDARDS ORGANISATIONS

INTERNATIONAL
International Standardisation Organisation (ISO)
Address: P.O. Box 56, CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 7490111
Fax: + 41 (0) 22 7333430
E-mail: central@iso.ch

EUROPEAN UNION
European Committee for Normalisation (CEN)
Address: Rue de Strassart 36, 1050 Brussel, Belgium
Telephone: + 32 (0) 2 5196811
Fax: + 32 (0) 2 5196819
Internet: www.cenclcbel.be

THE NETHERLANDS
Netherlands Standardisation Institute
(Nederlands Normalisatie Instituut (NNI))
Address: Kalfjeslaan 2, P.O. Box 5059,
2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15-2690390
Fax: + 31 (0) 15-2690190
Internet: www.nni.nl

UNITED KINGDOM
British Standards Institution (BSI)
Address: 389 Chiswick High Road,
London W4 4AL, United Kingdom
Telephone: + 44 (0) 181-9969000
Fax: + 44 (0) 181-9967400
E-mail: info@bsi.org.uk

FRANCE
Association Française de Normalisation (AFNOR)
Address: Tour Europe,
F-92049 Paris la Défense Cedex, France
Telephone: + 33 (0) 1-42915555
Fax: + 33 (0) 1-4291565

GERMANY
Deutsches Institut für Normung (DIN)
Address: Burggrafenstrasse 6, D-10787 Berlin,
Germany
Telephone: + 49 (0) 30-2601-0
Fax: + 49 (0) 30-26011231
E-mail: postmaster@din.de

ITALY
Ente Nazionale Italiano di Unificazione (UNI)
Address: Via Battistotti Sassi 11/b,
1-20133 Milano, Italy
Telephone: + 39 (0) 2-700241
Fax: + 39 (0) 2-70106106
E-mail: webmaster@uni.unicei.it

SPAIN
Associacion Española de Normalizacion y Certificación (AENOR)
Address: Génova 6, E-28004 Madrid, Spain
Telephone: + 34 (0) 1-4326000
Fax: + 34 (0) 1-3104976

APPENDIX 4 SOURCES OF PRICE INFORMATION

World Federation of the Sporting Goods Industry (SGI)

Address:	Le Hameau, Chalet les Hespérides,
	P.O.Box 480, 1936 Verbier, Switzerland
Telephone:	+ 41 (0) 27-7753570
Fax:	+ 41 (0) 27-7753579
E-mail:	wsfgi@verbier.ch
Internet:	www.wfsgi.org

EFTTA
(European Fishing Tackle Trade Association)

Address:	71 St John Street,
	London EC1M 4NJ, United Kingdom
Telephone:	+ 44 (0) 20 72530777
Fax:	+ 44 (0) 20 72537779
E-mail:	info@eftta.com
Internet:	www.martex.co.uk/eftta

Sport-Scheck

Internet:	www.sportscheck.com

JJB Sports

Internet:	www.jjb.com

Perry Sport

Intenet:	www.perrysport.nl

APPENDIX 5 TRADE ASSOCIATIONS

INTERNATIONAL
World Federation of the Sporting Goods Industry (SGI)
Address: Le Hameau, Chalet les Hespérides,
P.O.Box 480, 1936 Verbier, Switzerland
Telephone: + 41 (0) 27-7753570
Fax: + 41 (0) 27-7753579
E-mail: wsfgi@verbier.ch
Internet: www.wfsgi.org

FESI
(Federation of the European Sporting Goods Industry)
Address: 3 Avenue de Janvier, 1200 Bruxelles, Belgium
Telephone: + 32 (0) 2 7628648
Fax: + 32 (0) 2 7718746
E-mail: info@fesi-sport.org
Internet: www.fesi-sport.org

International Snowboard Federation
Address: Pradlerstrasse 21, 6020 Innsbruck, Austria
Telephone: + 43 (0) 512 342834
Fax: + 43 (0) 512 3428342

EFTTA
(European Fishing Tackle Trade Association)
Address: 71 St John Street,
London EC1M 4NJ, United Kingdom
Telephone: + 44 (0) 20 72530777
Fax: + 44 (0) 20 72537779
E-mail: info@eftta.com
Internet: www.martex.co.uk/eftta

FRANCE
FIFAS
(French Sports and Leisure Federation)
Address: 18 rue Curnonsky, 75017 Paris, France
Telephone: + 33 (0) 1 47315623
Fax: + 33 (0) 1 47315632
E-mail: fifas@club-internet.fr
Internet: www.fifas.fr

FPS
(French Sports Goods federation for Retail Trade)
Address: 124 Boulevard Haussmann,
75008 Paris, France
Telephone: + 33 (0) 1 44707790
Fax: + 33 (0) 1 44707791
E-mail: fps@filieresport.com
Internet: www.filieresport.com

GERMANY
BSI
(German Association of Sports Goods Industry)
Address: Postfach 1160, 53581 Bad-Honnef, Germany
Telephone: + 49 (0)22 2476381
Fax: + 49 (0)22 2475940
E-mail: bsiev@aol.com

VDS
(German Sports Goods federation for Retail Trade)
Address: Postfach 3480, 65024 Wiesbaden, Germany
Telephone: + 49 (0)611 990050
Fax: + 49 (0)611 9900599

ITALY
ADAS
(Italian Sports Goods federation for Retail Trade)
Address: Corso Venezia 47-49, 20121 Milano, Italy
Telephone: + 39 (0) 2 76001403
Fax: + 39 (0) 2 7750480

ASSOSPORT
(Italian Association of Sports Goods Industry)
Address: Via Petitti 16, 20149 Milano, Italy
Telephone: + 39 (0) 2 39215282
Fax: + 39 (0) 2 3921098

THE NETHERLANDS
FGHS
(Association of manufacturers and wholesalers of Sports Goods)
Address: Sports Business Center, Plesmanstraat 1,
3833 LA Leusden, The Netherlands
Telephone: + 31 (0) 33 4343580
Fax: + 31 (0) 33 4343583
E-mail: fghs@euronet.nl
Internet: www.fghs.nl

MITEX SPORT
(Federation of Dutch Sports Goods Retailers)
Address: Postbus 162,
3940 AD Doorn, The Netherlands
Telephone: + 31 (0) 343 473250
Fax: + 31 (0) 343 473251
E-mail: mitex@mitex.nl
Intertnet: www.mitex.nl

SPAIN
AFYDAD
(Spanish Association of Sports Goods Industry)
Address: Avenida Diagonal 452-454,
8006 Barcelona, Spain
Telephone: + 34 (0) 93 4169489
Fax: + 34 (0) 93 4169300

UNITED KINGDOM

TSIF

(The UK Sports Industries Federation)

Address:	Federation House,
	Stoneleigh Park CV8 2RF, Warwickshire, UK
Telephone:	+ 44 (0) 1203 414999
Fax:	+ 44 (0) 1203 414990
Internet:	www.sports-life.com
Internet:	www.sportsdata.co.uk

Snowsport Industries of G.B.

Address:	30 Burnside Rd, Burnside, Glasgow, UK
Telephone:	+ 44 (0) 141 6344262
Fax:	+ 44 (0) 141 6344262

APPENDIX 6 TRADE FAIR ORGANISERS

ISPO
(International Trade Fair for Sports Equipment and Fashion)

Frequency:	Biennial
Address:	Messe Munchen GmbH, Messegelände, D-81823 München, Germany
Telephone:	+ 49 (0) 89-94920161
Fax:	+ 49 (0) 89-94920169
Internet:	www.ispo.com
E-mail:	ispo@messe-muenchen.de

MIDO

Frequency:	Annual
Address:	Mido Exhibition, Via Petitti 16, 20149 Milano, Italy
Telephone:	+ 39 (0) 2-32673673
Fax:	+ 39 (0) 2-324233

40°
(Sportswear and sport equipment exhibition)

Frequency:	Biennial
Address:	EMAP Fashion, Angel House, 338-346 Goswell Road, London EC1V 7SP, United Kingdom
Telephone:	+ 44 (0) 207-5201500
Fax:	+ 44 (0) 207-5201501

GLISEXPO
(International Trade Fair for gliding sports equipment, clothing and footwear)

Frequency:	Bienial
Address:	Glisse Promotion, 20 Rue Maryse Bastie, ZA Maignon, 64600 Anglet, France
Telephone:	+ 33 (0) 5-59425151
Fax:	+ 33 (0) 5-59425159
Internet:	www.glisexpo.fr
E-mail:	harnie@glisexpo.fr

SPORT
(International Sport Exhibition)

Frequency:	Annual
Address:	Fira de Barcelona, Avenida Reina Maria Christina, E-08004 Barcelona, Spain
Telephone:	+ 34 (0) 3-2332000
Fax:	+ 49 (0) 3-2332299

SPORT BUSINESS FAIR

Frequency:	Biennial
Address:	Sports Business Center, Plesmanstraat 1, 3833 LA Leusden, The Netherlands
Telephone:	+ 31 (0) 33-4320302
Fax:	+ 31 (0) 33-4320303
E-mail:	sbc@sportsbusinesscenter.nl
Internet:	www.sportsbusinesscenter.nl

EUROPEAN OUTDOOR
(International Trade Fair for outdoor equipment, clothing and footwear)

Frequency:	Annual
Address:	Messe Friederichshafen, Meistershofenstrasse 25, 88045 Friedrichshafen, Germany
Telephone:	+ 49 (0) 7541-7080
Fax:	+ 49 (0) 7541-708110

GOLF EUROPE
(International Trade Fair for golf equipment, clothing and footwear)

Frequency:	Biennial
Address:	Messe Munchen GmbH, Messegelände, D-81823 München, Germany
Telephone:	+ 49 (0) 89-32353180
Fax:	+ 49 (0) 89-94920169
Internet:	www.ispo.com
E-mail:	ispo@messe-muenchen.de

APPENDIX 7 TRADE PRESS

INTERNATIONAL

Sporting Goods Intelligence

Address: 32, Rue de la Prairie, F-94360 Bry-sur-Marne
Telephone: + 33 (0) 1-49838242
Fax: + 33 (0) 1-49838224
E-mail: edm@microking.net

FRANCE

Sport Premiere Magazine

Address: 3, rue de Téhéran, 75008 Paris, France
Telephone: + 33 (0) 1 42894104
Fax: + 33 (0) 1 45611200

Sporteco

Address: 26 blvd. Richard Lenoir, 75011 Paris, France
Telephone: + 43 (0) 1 49295656
Fax: + 43 (0) 1 49297676

GERMANY

Markt Intern

Address: Grafenberger Allee 30, 40237 Düsseldorf, Germany
Telephone: + 49 (0) 211 6698130
Fax: + 49 (0) 211 6698189

SAZ

Address: SAZ Verlag GmbH, Rumfordstrasse 42, 80469 München, Germany
Telephone: + 49 (0) 89 212110-90
Fax: + 49 (0) 89 212110-96
Internet: www.saz.de

Sport und Mode

Address: Verlag Chmielorz GmbH, Marktplatz 13, 65183 Wiesbaden, Germany
Telephone: + 49 (0) 611 360980
Fax: + 49 (0) 611 301303
E-mail: sport+mode@chmielorz.de
Internet: www.spomo.de

ITALY

Articoli & Moda Sport

Address: Via Desiderio 3/9, 20131 Milano , Italy
Telephone: + 39 (0) 2 2367197
Fax: + 39 (0) 2 2365238

Moda Sport

Address: Palazinna San Rocco, Via San Rocco 17, 20135 Milano, Italy
Telephone: + 39 (0) 2 58315800
Fax: + 39 (0) 2 58316313
E-mail: esabbat@tin.it

NETHERLANDS

Sport Partner/ Tendens

Address: Maruba, Winthontlaan 200, 3526 Utrecht, Netherlands
Telephone: + 31 (0) 30 2891073
Fax: + 31 (0) 30 2898560
Internet: www.maruba.nl

International Sport Cult

Wieman & van de Glind

Address: Kampstraat 2b, 3741 AR Baarn, The Netherlands
Telephone: + 31 (0) 35-5430103
Fax: + 31 (0) 35-5431113
E-mail: sprtcult@worldonline.nl

SPAIN

CMD

Address: Verge-del Pillar 2, 8750 Molins de Rei (Barcelona), Spain
Telephone: + 34 (0) 93 6801111
Fax: + 34 (0) 93 6801162

Diffusion Sport

Address: Rosellon, 102 entl 1a, 8029 Barcelona, Spain
Telephone: + 34 (0) 93 3235702
Fax: + 34 (0) 93 3236080

Tradesport

Address: S.A. Balmes 217 4, 8006 Barcelona, Spain
Telephone: + 34 (0) 93 2185900
Fax: + 34 (0) 93 2378596

UNITED KINGDOM

SGB UK - Sports Update

Datateam Publishing Ltd.

Address: London Road, Maidstone Kent ME16 8LY, United Kingdom
Telephone: + 44 (0) 1622 687031
Fax: + 44 (0) 1622 757646

Sports Business

Address: 205 Blackfriars Foundry, 156 Backfriars Road, London SE1 8EN, United Kingdom
Telephone: + 44 (0) 171-7217161
Fax: + 44 (0) 171-7217162
E-mail: sportbusiness@buirski.co.uk
Internet: www.sportbusiness.com

Golf Industry News

Address: Advance House, 37 Millharbour, London E14 9TX, United Kingdom
Telephone: + 44 (0) 171-5381031
Fax: + 44 (0) 171-5384106

Outdoor Trade & Industry

Address:	KSA Ltd., 97 Front street, Whickham, Newcastle upon Tyne, Tyne & Wear NE16 45 L, UK
Telephone:	+ 44 (0) 191-4881947
Fax:	+ 44 (0) 191-4886718
E-mail:	ksalum01@aol.com
Internet:	www.camping-outdoor-leisure.co.uk

Tackle Talk International (fishing tackle)

Address:	Pendragon Publications, 22 Nightingale Road, Bushey, Watford, Herts WD2 3NJ, UK
Telephone:	+ 44 (0) 181-9506360
Fax:	+ 44 (0) 181-4204163

APPENDIX 8 TRADE PROMOTION ORGANISATIONS

INTERNATIONAL
International Trade Center (ITC)
Market News Service (MNS)
Division of Product and Market Development
Address: Palais des Nations, P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300111
Fax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA
Austria Federal Economic Chamber
Address: Wiener Hauptstrasse 63, 1045 Vienna, Austria
Telephone: + 43 (0) 1 501050
Fax: + 43 (0) 1 50206250
E-mail: hotline@wkoe.wk.or.at
Internet: www.wk.or.at

DENMARK
The Danish Import Promotion Office for products from developing countries (DIPO)
Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 950500
Fax: + 45 (0) 33 325216
E-mail: dok@commerce.dk
Internet: www.commerce.dk

FRANCE
COLEACP
Address: 5 Rue de la Corderie, Centra 342,
94586 Rungis Cedex, France
Telephone: + 33 (0) 1 41800210
Fax: + 33 (0) 1 41800219
E-mail: coleacp@coleacp.org
Internet: www.coleacp.org

GERMANY
BFAI, Federal Office of Foreign Trade Information, Germany
Berlin Office
Address: Scharnhornstrasse 36, P.O. Box 650268,
13302 Berlin, Germany
Telephone: + 49 (0) 30 20145200
Fax: + 49 (0) 30 20145204
Internet: www.bfai.de

Köln Office
Address: Agrippastrasse 87-93, P.O. Box 100522,
50455 Köln, Germany
Telephone: + 49 (0) 221 20570
Fax: + 49 (0) 221 2057212
E-mail: bfai@compuserve.com

ITALY
ICE
(National Institute for Foreign Trade)
Address: Via Liszt 21, 00144 Rome, Italy
Telephone: + 39 (0) 6 59921
Fax: + 39 (0) 6 59926900
E-mail: sitoece@ice.it
Internet: www.ice.it

THE NETHERLANDS
CBI
(Centre for the Promotion of Imports from developing countries)
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY
The Norwegian Agency for Development Cooperation (NORAD)
Address: Tolbugaten 31,
P.O. Box 8034 Deo, Oslo, Norway
Telephone: + 47 (0) 22 314400
Fax: + 47 (0) 22 314403
E-mail: postmottak@oslo.norad.telemax.no

SWEDEN
The Swedish International Development Cooperation Agency (SIDA)
Department for Infrastructure & Economic Cooperation
Address: S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Fax: + 46 (0) 8 208864

SWITZERLAND
SIPPO
(Swiss Office for Trade Promotion)
Address: Stampsenbachstrasse 85, 8035 Zürich, Switzerland
Telephone: + 41 (0) 1 3655151
Fax: + 41 (0) 1 3655221
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

United Nations International Labour Organisation (ILO)

Address: 4, Route des Morillons, CH-1211 Geneva 22, Switzerland
Telephone: + 41 (0) 22 7996111
Fax: + 41 (0) 22 7986358
Internet: www.ilo.org

EUROPEAN UNION

International Chamber of Commerce

Address: 38, cours Albert 1er, 75008 Paris, France
Telephone: + 33 (0) 1 49532828
Fax: + 33 (0) 1 49532942
E-mail: eurocham@mail.interpac.be
Internet: www.ecib.com

European Commission, Directorate General X (Sports Affairs)

Address: Rue de la Loi 200, 1049 Brussels, Belgium
Telephone: + 32 (0) 2-2969258
Fax: + 32 (0) 2-2957747

Harpers Sports and Leisure

(directory of UK trade)

Address: Harpers Publications Ltd., 47a High Street, Bushey, Watford, Herts WD2 1BD, UK
Telephone: + 44 (0) 181-9509522
Fax: + 44 (0) 181-9507998

Eurostat, Statistical Bureau of the European Union

Address: Rue Alcide de Gasperi, L-2920 Luxembourg, Luxembourg
Telephone: + 352 (0) 4301 34567
Fax: + 352 (0) 4301 3015
E-mail: agnesn@eurostat.datashop.lu
Internet: www.eurostat.eu.int/eurostat.html

Corporate Intelligence Group (CIG) / Mintel

Address: 18-19 Long Lane, London EC1A 9PL, United Kingdom
Telephone: + 44 (0) 207 76065932
Fax: + 44 (0) 171 6969004
Internet: www.cior.com

GTZ

(German Agency for Technical Cooperation)

Address: Dag-Hammerskjöld-weg 1-5, P.O. Box 5180, 65726 Eschborn, Germany
Telephone: + 49 (0) 6196 790000
Fax: + 49 (0) 6196 797414
E-mail: postmaster@gtz.de

THE NETHERLANDS

CBI

Centre for the Promotion of Imports from developing countries

Address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

Belasting Dienst Douane (Customs)

Dept. External and Internal Communication

Address: P.O. Box 50964, 3007 BG Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2904949
Special information number: + 31 (0) 800-0143
Fax: + 31 (0) 10 2904875
Internet: www.douane.nl

Benelux Octrooibureau

(Design and brand registration office for The Netherlands, Benelux and the EU)

Address: Scheveningseweg 82, 2517 KZ The Hague, The Netherlands
Telephone: + 31 (0) 70 3527500
Fax: + 31 (0) 70 3527589
Internet: www.octrooibureau.nl

CBI / AccessGuide

c/o CBI, Centre for the Promotion of Imports from developing countries

Address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone: 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@accessguide.nl
Internet: www.cbi.nl/accessguide

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the list of developing countries from the OECD (Organisation for Economic Co-operation and Development), as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea).

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zambia
Zimbabwe

Note: Eurostat figures do not include figures of Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

Dated: January (2000)

APPENDIX 11 LIST OF NETHERLANDS IMPORTERS AND KEY EU IMPORTERS

NETHERLANDS IMPORTERS

Agu B.V.
(importer of fitness and golf equipment, outdoor, adventure and camping sports)
Address: Koraalstraat 1,
1812 RK Alkmaar, The Netherlands
Telephone: + 31 (0) 72-5411511
Fax: + 31 (0) 72-5411500
E-mail: info@agu.nl

Aim Sport
(importer of in-line skates, hockey equipment and sports clothing and footwear)
Address: P.O. Box 211,
2180 BX Hillegom, The Netherlands
Telephone: + 31 (0) 252-524808
Fax: + 31 (0) 252-524903

Albatros B.V.
(importer of fishing tackle)
Address: Jolweg 11,
1435 KR Rijsenhout, The Netherlands
Telephone: + 31 (0) 297-327777
Fax: + 31 (0) 297-342207

Bizerta B.V.
(importer of sports and camping goods)
Address: P.O. Box 108,
2160 AC Lisse, The Netherlands
Telephone: + 31 (0) 252-219146
Fax: + 31 (0) 252-212581

Dunlop Slazenger Benelux
(importer of tennis badminton, squash rackets, balls, sports bags and sports clothing)
Address: Hagenweg 5,
4131 LX Vianen, The Netherlands
Telephone: + 31 (0) 347-357272
Fax: + 31 (0) 347-375540
E-mail: info@dunlopsports.nl
Internet: www.dunlopsports.com

Eilers B.V.
(importer of balls, sports accessories and sports clothing)
Address: Industrieweg 48 B,
2382 NW Zoeterwoude, The Netherlands
Telephone: + 31 (0) 71-5899022
Fax: + 31 (0) 71-5895675

Engelhart B.V.
(trader of balls, table tennis, sports accessories and sports clothing)
Address: P.O. Box 4059,
5400 JB Tilburg, The Netherlands
Telephone: + 31 (0) 13-5445789
Fax: + 31 (0) 13-5445669
E-mail: info@engelhart.nl

Eurolight B.V.
(importer of skates, skis and other snowsports equipment, watersports and outdoor equipment)
Address: Jan van Galenstraat 14,
3115 JG Schiedam, The Netherlands
Telephone: + 31 (0) 30-2411091
Fax: + 31 (0) 30-2411218

Exelz' Intenational B.V.
(importer of in-line skates, skate and snowboarding equipment and sports clothing)
Address: Hoogooorddreef 86,
1101 BG Amsterdam Zuid-Oost,
The Netherlands
Telephone: + 31 (0) 20-3425342
Fax: + 31 (0) 20-4523750
E-mail: exelz@excelz.nl

Hagen Sports
(importer of sports and camping goods, especially balls)
Address: Stoevenhoek 120,
7521 RB Enschede, The Netherlands
Telephone: + 31 (0) 53-4314242
Fax: + 31 (0) 53-4331088

HD Sports & Leisure products
(importer of table tennis and fitness equipment)
Address: Schoepenweg 45,
8243 PX Lelystad, The Netherlands
Telephone: + 31 (0) 320-222838
Fax: + 31 (0) 320-222198

Koltec Sport Equipment
(importer of ski and snowboard equipment)
Address: Postbus 9044,
3301 AA Dordrecht, The Netherlands
Telephone: + 31 (0) 78-6165444
Fax: + 31 (0) 78-6215755
E-mail: koltec.sport.eq@wxs.nl

Kettler Benelux
(importer of fitness and gymnasium equipment)
Address: Indumastraat 18,
5753 Deurne, The Netherlands
Telephone: + 31 (0) 493-3100345
Fax: + 31 (0) 493-3100739
E-mail: kettler@xs4all.nl

Kubus Sports B.V.
(importer of water and snowsports equipment)
Address: Amsterdamsestraatweg 19,
1411 AW Naarden, The Netherlands
Telephone: + 31 (0) 35-6954695
Fax: + 31 (0) 35-6954690

Nike Europe B.V.
(importer of sports goods, especially balls, sports footwear, sports clothing, sports bags and accessories)
Address: Energieweg 8,
1271 ED Huizen, The Netherlands
Telephone: + 31 (0) 35-5248524
Fax: + 31 (0) 35-5248500
E-mail: info@nike.com
Internet: www.nike.com

The Nomad Company B.V.
(importer of outdoor and camping equipment and wear)
Address: Postbus 96,
6900 AB Zevenaar, The Netherlands
Telephone: + 31 (0) 316-583500
Fax: + 31 (0) 316-583535
E-mail: info@nomad.nl
Internet: www.nomad.nl

Pacific Nederland B.V.
(importer of tennis, badminton and squash equipment, sport bags and accessories)
Address: Uitmaat 19,
6987 ER Griesbeek, The Netherlands
Telephone: + 31 (0) 313-632444
Fax: + 31 (0) 313-632555
E-mail: pacific@tref.nl

Piri Sport B.V.
(importer of balls, (table) tennis, badminton, fitness and gym equipment, sport bags and accessories)
Address: Het Lenfert 35,
7547 SN Enschede, The Netherlands
Telephone: + 31 (0) 53-4320244
Fax: + 31 (0) 53-4303811

Ramon Sport B.V.
(importer of tennis, badminton, fitness and gym equipment, sport bags and accessories)
Address: Hopperzuigerstraat 39,
1333 HM Almere, The Netherlands
Telephone: + 31 (0) 36-5323630
Fax: + 31 (0) 36-5321179

Reebok Europe B.V.
(importer of sports goods, especially fitness equipment, sports footwear, sports clothing and accessories)
Address: Fokkerstraat 2,
3833 LD Leusden, The Netherlands
Telephone: + 31 (0) 33-4347100
Fax: + 31 (0) 33-4321867
E-mail: info@reebok.com
Internet: www.reebok.com

Rucanor Europe B.V.
(importer of balls, rackets, table tennis, hockey, fitness, watersport, sports clothing and sports accessories)
Address: Plesmanstraat 1, 3833 LA Leusden, The Netherlands
Telephone: + 31 (0) 33-4320658
Fax: + 31 (0) 33-4320467
E-mail: info@rucanor.com
Internet: www.rucanor.com

Shakespeare Hengelsport B.V.
(importer of fishing tackle)
Address: De Steiger 66,
1351 AD Almere, The Netherlands
Telephone: + 31 (0) 36-5474000
Fax: + 31 (0) 36-5317792

Sports Air
(importer of sports and camping goods)
Address: Beerstratenlaan 20,
2421 GP Nieuwenkoop, The Netherlands
Telephone: + 31 (0) 172-574035
Fax: + 31 (0) 172-571712

Sport Direct
(importer of sports goods)
Address: Arnsbergstraat 4,
7418 EZ Deventer, The Netherlands
Telephone: + 31 (0) 570-630515
Fax: + 31 (0) 570-624343

Sport'81 B.V.
(importer of balls, fitness and gym equipment)
Address: Kiotoweg 393,
3047 BG Rotterdam, The Netherlands
Telephone: + 31 (0) 10-4350099
Fax: + 31 (0) 10-4356821
E-mail: info@sport81.nl

Sportimex Benelux B.V.
(importer of balls, skates and sports accessories)
Address: Brandseweg 1a,
4871 CM Etten-Leur, The Netherlands
Telephone: + 31 (0) 76-5037444
Fax: + 31 (0) 76-5033198

Viking B.V.
(manufacturer and importer of skates)
Address: Rijnkade 18A/19A,
1382 GT Weesp, The Netherlands
Telephone: + 31 (0) 294-413332
Fax: + 31 (0) 294-414215
E-mail: info@viking.nl
Internet: www.viking.nlnl

Viking Adventure Sports
(importer of camping goods)
Address: Meipoortstraat 55,
6981 DJ Doesburg, The Netherlands
Telephone: + 31 (0) 313-472828
Fax: + 31 (0) 313-474045
E-mail: taai@worldonline.nl
Internet: www.vking-outdoor.nl

Webena Sport Almere B.V.
(importer of sports and camping goods)
Address: De Steiger 95-96,
1351 AA Almere-Haven, The Netherlands
Telephone: + 31 (0) 36-5359050
Fax: + 31 (0) 36-5359055

Zandstra B.V.
(manufacturer and importer of skates)
Address: Industrieweg 8,
8501 SN Joure, The Netherlands
Telephone: + 31 (0) 513-415858
Fax: + 31 (0) 513-416415
E-mail: info@zandstra.nl
Internet: www.zandtrasport.nl

BUYING GROUPS

Intres / Intersport
(operate the "Intersport" Chain)
Address: P.O. Box 150,
3870 CD Hoevelaken, The Netherlands
Telephone: + 31 (0) 33-2532911
Fax: + 31 (0) 33-2532299
E-mail: info@intres.nl
Internet: www.intres.nl

Euretco B.V.
Address: P.O. Box 3254,
4800 ME Breda, The Netherlands
Telephone: + 31 (0) 76-5785911
Fax: + 31 (0) 76-5719560
E-mail: info@euretco.nl
Internet: www.euretco.nl

Fair Play International Sports
Address: Plesmanstraat 1,
3833 LA Leusden, The Netherlands
Telephone: + 31 (0) 33-4320118
Fax: + 31 (0) 33-4320631
E-mail: info@fairplay.nl
Internet: www.fairplay.com

CHAIN STORES

AktieSport B.V.
Address: Edisonweg 4,
4131 PC Vianen, The Netherlands
Telephone: + 31 (0) 347-327000
Fax: + 31 (0) 347-329001
E-mail: info@aktiesport.nl
Internet: www.aktiesport.nl

Perry Sport B.V.
Address: Oosteindeweg 247 B,
1432 AT Aalsmeer, The Netherlands
Telephone: + 31 (0) 297-330600
Fax: + 31 (0) 297-330650
E-mail: info@perrysport.nl
Internet: www.perrysport.nl

Hoogenbosch Retail Group B.V.
(Olympus Sport and Pro-Sport)
Address: P.O. Box 3065,
5203 DB 's-Hertogenbosch, The Netherlands
Telephone: + 31 (0) 73-6483483
Fax: + 31 (0) 73-6483594

Footlocker Europe B.V.
Address: P.O. Box 309,
4130 EH Vianen, The Netherlands
Telephone: + 31 (0) 347-323300
Fax: + 31 (0) 347-323305
E-mail: info@footlocker.com
Internet: www.footlocker.com

DEPARTMENT STORES

Hema B.V.
Address : P.O. Box 23220,
1100 DS Amsterdam, The Netherlands
Telephone: + 31 (0) 20 3114411
Fax: + 31 (0) 20 3114000
Internet: www.hema.nl

Vroom & Dreesmann Nederland B.V.
Address: P.O. Box 276,
1000 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5959111
Fax : + 31 (0) 20 6926510
Internet: www.vroomendreesmann.nl

MAIL ORDER

Wehkamp B.V.
Address: P.O. Box 400,
8000 AK Zwolle, The Netherlands
Telephone: + 31 (0) 38 4216868
Fax: + 31 (0) 38 4973580
E-mail: info@wehkamp.nl
Internet: www.wehkamp.nl

KEY IMPORTERS IN THE SELECTED MARKETS WITHIN THE EU

GERMANY

CPS Watersport GmbH
(Importer of watersports equipment and accessories)
Address: Burgfriedenstrasse 25, 85221 Dachau, Germany
Telephone: + 49 (0) 8131 85992
Fax: + 49 (0) 8131 85925

Equal Athletics
(Importer of equipment for athletics and outdoor games)
Address: Piramisenserstrasse 13,
76187 Karlsruhe, Germany
Telephone: + 49 (0) 721 9715760
Fax: + 49 (0) 721 9715761

E.F. Eurofitness GmbH
(Importer of fitness equipment)
Address: Am Windbusch 1, 32758 Detmold, Germany
Telephone: + 49 (0) 89 30779105
Fax: + 49 (0) 89 30779106

Intersport (Deutschland) GmbH
(Buying group of sports and camping goods)
Address: Wannenäckerstrasse 50,
74078 Heilbronn, Germany
Telephone: + 49 (0) 7131 2880
Fax: + 49 (0) 7131 21257
E-mail: info@intersport.de
Internet: www.intersport.de

Joola Tischtennis GmbH & Co. KG
(Importer of table tennis equipment and accessories)
Address: Wiesenstrasse 13,
76833 Siebeldingen, Germany
Telephone: + 49 (0) 6345 95470
Fax: + 49 (0) 6345 954711
E-mail: joola@t-online.de
Internet: www.joola.de

Salewa Sportgeräte GmbH & Co. KG
(Importer of outdoor equipment, clothing and footwear)
Address: Saturnstrasse 63, 85609 Aschheim, Germany
Telephone: + 49 (0) 89 909930
Fax: + 49 (0) 89 90993190
E-mail: info@salewa.com
Internet: www.salewa.com

Sport 2000 Deutschland
(Buying group of sports and camping goods)
Address: Nord-West-Ring Strasse 11,
63533 Mainhausen, Germany
Telephone: + 49 (0) 6182 928493
Fax: + 49 (0) 6182 928190
E-mail: info@.sport2000de
Internet: www.sport2000.de

FRANCE

Act'Distribution
(Importer of outdoor equipment and travel accessories)
Address: 21, rue J.J. Rousseau,
92136 Issy-Les-Moulineaux Cedex (Paris), France
Telephone: + 33 (0) 1 40951900
Fax: + 33 (0) 1 40958977
E-mail: astrid.judmaier@wanadoo.fr

Cornilleau S.A.
(Importer of sports goods)
Address: 14 Route Nationale, BP 2,
60120 Bonneuil Les Eaux, France
Telephone: + 33 (0) 3 44802222
Fax: + 33 (0) 3 44802223
E-mail: export@cornilleau.fr
Internet: www.cornilleau.com

Décathlon
(Sports chain store)
Address: 4 bd de Mons, BP 299,
59665 Villeneuve dÁscq Cedex 8, France
Telephone: + 33 (0) 320 335000
Fax: + 33 (0) 320 335001
Internet: www.decathlon.com

Europêche
(Retailers buying group for fishing tackle)
Address: 16 alleé Piencourt, 48000 Mende, France
Telephone: + 33 (0) 4 66490064
Fax: + 33 (0) 4 66491933

France Sports
(directory of French trade)
Address: CEPP Publications, rue Dagorno,
75012 Paris, France
Telephone: + 33 (0) 1-43473020
Fax: + 33 (0) 1-43465818

Lafuma
(Importer of outdoor goods)
Address: B.P. 60, 26140 Anneyron, France
Telephone: + 33 (0) 4 75313131
Fax: + 33 (0) 4 75315726
E-mail: contact@lafuma.fr
Internet: www.lafuma.com

Leader Sports Europe
(Importer of watersports equipment, spectacles and accessories)
Address: Impasse du Poutalet, 64121 Serres Castet, France
Telephone: + 33 (0) 5 59128485
Fax: + 33 (0) 5 59128984
E-mail: jrochett@zleader.com
Internet: www.zleader.com

Other French importers can be found at:
www.cnpc.fr

UNITED KINGDOM

Acushnet Limited
(Manufacturer/importer of golf equipment)
Address: Caxton Road, St Ives, Huntingdon, Cambridgeshire, PE17 4LS United Kingdom
Telephone: + 44 (0) 1480-301114
Fax: + 44 (0) 1480-492108
E-mail: ukoffice@tfjww.com
Internet: www.titleist.com

Ashima Hook Company
(Importer of fishing tackle)
Address: The Hook House, 40 Buckhurst Road, Frimley Green, Camberley, Surrey, GU16 6LJ United Kingdom
Telephone: + 44 (0) 1252-838264
Fax: + 44 (0) 1252-836474
E-mail: andy@ashima.demon.co.uk
Internet: www.ashima.co.uk

Cicada Outdoor
(Wholesaler of outdoor equipment)
Address: 5 Lyon Road, Romford, Essex, RM12 BA, United Kingdom
Telephone: + 44 (0) 1708-727444
Fax: + 44 (0) 1708-733399

CY Inflatables Ltd
(Manufacturer/importer of watersports equipment)
Address: Unit 3-3A Queniborough Ind Est, Melton Road, Queniborough, Leicestershire, LE7 8FP, UK
Telephone: + 44 (0) 1116-2602506
Fax: + 44 (0) 1116-2640403
E-mail: steve@inflatables.uk.com
Internet: members.aol.com/CYinflate

Eveque Leisure Equipment Ltd
(Manufacturer/importer of sports equipment)
Address: 7/10 Duttons Bus Centre, Dock Road, Northwich, Cheshire, CW9 5HJ United Kingdom
Telephone: + 44 (0) 1606-45611
Fax: + 44 (0) 1606-42157
E-mail: mail@eveque.co.uk
Internet: www.eveque.co.uk

Icon Health & Fitness Ltd
(Importer/buying group of fitness equipment)
Address: Unit 4, Revie Road Industrial Estate, Leeds, West Yorkshire, LS11 8JG United Kingdom
Telephone: + 44 (0) 113-3877160
Fax: + 44 (0) 113-2411120
E-mail: mail@iconfitness.co.uk

Safari Sports Ltd
(Manufacturer/importer of outdoor equipment)
Address: Unit 4 (3), Bessborough Works, Molessey Road, West Molessey, KT8 2QS United Kingdom
Telephone: + 44 (0) 208-9797274
Fax: + 44 (0) 208-9797296
E-mail: admin@safarisports.co.uk
Internet: www.safarisports.co.uk

ITALY

Aqua Sphere
(Importer of watersports equipment and accessories)
Address: Piazzale Kennedy 1/D, 16129 Genova, Italy
Telephone: + 39 (0) 10 54451
Fax: + 39 (0) 10 5445244
E-mail: aquasphere@technisub.com
Internet: www.aquasphere.it

Conbsorzio Artigianexport
(cooperation of sports equipment)
Address: Via Bastia 40, 31100 Trevisio, Italy
Telephone: + 39 (0) 422 433200
Fax: + 39 (0) 422 433205
E-mail: info@artigianexport.com
Internet: www.artigianexport.com

Benetton Group - Rollerblade
(Manufacturer/Importer of in-line skates, accessories and sports clothing)
Address: Via Minelli, 31050 Ponzano (TV), Italy
Telephone: + 39 (0) 422 519111
Fax: + 39 (0) 422 515060
E-mail: info@benetton.com
Internet: www.benetton.com

Gamma Sports s.a.s.
(Importer of rackets, balls and racketsports accessories)
Address: Via Volta 31 - 37,
31025 S.Lucia di Piave (TV), Italy
Telephone: + 39 (0) 483 701880
Fax: + 39 (0) 483 460497
Internet: www.gammasports.com

Giacomelli Sports Group S.p.A.
(Chain store of sports and camping goods)
Address: Via Nuova Circonvallazione ovest 14/16,
47900 Rimini, Italy
Telephone: + 39 (0) 541 748611
Fax: + 39 (0) 541 741680
E-mail: info@giacomellisport.com
Internet: www.giacomellisport.com

Industria Centenari e Zinelli S.p.A.
(Importer of sports goods)
Address: Via Novembre 5, 20012 Cuggiono (MI), Italy
Telephone: + 39 (0) 02 97240031
Fax: + 39 (0) 02 9746637

Napapijri Geographic Green Sport Monte Bianco S.r.l.
(Importer of outdoor equipment and accessories)
Address: Frazione Villair, 11020 Quart Aosta, Italy
Telephone: + 39 (0) 165 773511
Fax: + 39 (0) 165 773522
E-mail: info@napapijri.it.com
Internet: www.napapijri.it

SPAIN

Amaya Sport S.L.
(Importer of sports and camping goods)
Address: Pol. Ind. Talluntxe, C/A Naves 16-20,
Noain, Spain
Telephone: + 34 (0) 948 317162
Fax: + 34 (0) 948 317352

Casa Artiach S.A.
(Importer of outdoor equipment and camping goods)
Address: C/. Trabajo 8, 50008 Zaragoza, Spain
Telephone: + 34 (0) 976 421100
Fax: + 34 (0) 976 416793
E-mail: info@artiach.com
Internet: www.artiach.com

B.H. Fitness - Excercycle S.A.
(Manufacturer/Importer of fitness equipment)
Address: PO Box 195, 01080 Vittoria, Spain
Telephone: + 34 (0) 945 290258
Fax: + 34 (0) 945 290049

Calzados Fal S.A. / Chiruca
(Importer of outdoor equipment)
Address: Avenida de Logrono 21,
26580 Arnedo (La Rioja), Spain
Telephone: + 34 (0) 941 380800
Fax: + 34 (0) 941 383593
E-mail: fal@fal.es
Internet: www.fal.es

Sport Enebe S.L.
(Manufacturer/Importer of sports goods)
Address: C/. Fortuny 18 Pol. Rabasa,
03009 Alicante, Spain
Telephone: + 34 (0) 96 5172176
Fax: + 34 (0) 96 5171519
E-mail: export@enebe.com
Internet: www.enebe.com

Laken
(Importer of camping goods)
Address: Pol. Ind. Oeste, Avenida Principal,
Manzana 25,
30169 San Gines (Murcia), Spain
Telephone: + 34 (0) 968 880850
Fax: + 34 (0) 968 880770
E-mail: laken@laken.es
Internet: www.laken.es

Tecnologia Deportiva S.A.
(Manufacturer/Importer of sports and camping goods)
Address: Ctra. Catral km 2, 3360 Callosa de Segura
(Alicante), Spain
Telephone: + 34 (0) 96 5311764
Fax: + 34 (0) 96 5312378
E-mail: leondeoro@leondeoro.com
Internet: www.leondeoro.com

Other Spanish importers can be found at:
www.spaindustry.com

APPENDIX 12 USEFUL INTERNET SITES

Sports-data - website: www.sports-data.co.uk
This site has been set up by the TSIF (UK Sports Industries Federation) and provides information on the UK and European sports goods industry through their latest published market reports. It also gives the possibilities for contacting other suppliers and this site has linkages to other useful sports databases.

SGMA - website: www.sportlink.com
This site of the Sporting Goods Manufacturers Association, provides information on the USA and international sports industry and has a news service with summaries of their latest published market reports. It also gives a good selection of links to trade associations, publishers and other organisations.

SGI - website: www.wfsgi.org
This site of the World Federation of the Sporting Goods Industry, provides information on the USA and international sports industry and has a news service with summaries of their latest published market reports. It also gives a good selection of links to trade associations, publishers and other organisations involved in the sports industry.

Sporteum - website: www.sporteum.com
This site is a sports business platform and offers their members access to a larger, specialised network of qualified global suppliers making it possible to source and manufacture products by collaborating over the internet. It also provides information on the USA and international sports industry and has a news service on the latest issues in the worldwide sports goods markets.

Clearing House - website: www.clearing-house.cfwb.be
This site gives information on economical and political issues on sports in the EU. Its main purpose is to provide information on sports policies and participation in EU and Eastern European countries.Comparisons between EU countries are frequently made on the news items on this site.

Recommended sites for information of the selected countries are:

www.sportpress.de	Information about the German sports industry
www.cnpc.fr	Information about the French sports industry
www.sportsbusinesscenter. nl	Information about the Dutch sports industry

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the GreenBuss database on European trade-related environmental policy and technology;
- CBI' s Trade Documentation Centre offering supply-related information to importers, such as exporters' directories, country and sector information, periodicals from developing countries, and - to visiting exporters - demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI's computerized exporters' and importers' databases, containing around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

Mailing address:
CBI
P.O. Box 30009
3001 DA Rotterdam
Phone +31 (0) 10 201 34 34
Fax +31 (0) 10 411 40 81
E-mail cbi@cbi.nl
Internet www.cbi.nl

Office and showroom:
WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam,
The Netherlands.

Mailing address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Phone: +31 10 201 34 34 Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl Internet: http://www.cbi.nl
Office and showroom: WTC-Beursbuilding, 5th floor
37 Beursplein, Rotterdam, The Netherlands