

CHINA SPORTING GOODS INFORMATION

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New National Standards Reflect Industry Self-Regulation Rules



It is well known that outdoor fitness facility is simple and need just a little technology, so many small businesses involve in due to low access and plenty of social requirements and most of them are high energy and low cost factories without R&D, which usually copy others and occupy market by low price and go against with human health.

How to deal with it? Outdoor Fitness Facility Technology Federation debuted on 2010 Sports Show in the way of be closing to the nature and showed the theory of health, environment protection, science and technology and creation. In the view of industry development and human

health, some corporations help to bring out the new national standards and stop the price battle with sense of social responsibility.

At the same time, GB19272-2011 《General Security Requirements For Outdoor Fitness Facility》 national standards (hereinafter referred to as “new national standards”) have been in effect for almost one year. Based on the corporations, “new national standards” benefit the common people and are models for the Chinese sporting goods industry standards.

SN new national standards’ appearance and implement reflect industry self-regulation. From the merchants-

recruiting work for fitness massage and rehabilitation equipment area of the Sports Show, this industry experiences a huge leap development, with the number of enterprises over 400; exhibition area increases yearly and occupies almost half of the Sports Show, while 2 or 3 oversea brands enter into Chinese market through Sports Show platform every year.

As the fierce competition, except for standards, industry self-regulation is needed to guarantee the healthy development. The “new national standards” will regulate the outdoor fitness facility industry and producers that own advanced technology try to improve product quality and security.

For them, a set of unified regulations on product standards is unpractical, but it is necessary to build a set of market management rules.

2013 Sports Show merchants-recruiting has begun, we are glad to see the positivity of exhibitors who will show their hi-tech and low-carbon

products and we hope to lead the industry to develop healthily and turn "made in China" to "created by China" through Sports Show.

Hou Liang

Director of Fitness, Massage and Rehabilitation Zone in China Sports Show

Everyone Likes Green and Low-Carbon



The development of outdoor corporations can't do without big situation and environment. Specifically speaking, big outdoor brands keep sales growing and small businesses are impacted a little;

however upper and middle brands are seriously influenced by the economic recession.

Nowadays big brands such as Adidas and Nike reduce channels

and sports brands intend to transit, while e-commerce grows rapidly as expected. Under this back ground, exhibition of outdoor sports, bicycle, extreme skating in the 31st China Sports Show is launched from July

2013.

After the 18th CPC National Congress, the main question during this cycle is that: how to create in the show and how to service the consumers and do better at exhibition and experience work.

Organized by government, the Sports Show support small businesses to become bigger, and the organization committee will supply more policy to solve the problem they are facing. In addition, the organization committee will help all enterprises promote themselves.

Theme following the last year, the area of outdoor sports, bicycle and extreme skating in 2013 Sports Show encourages concept “Green, Low-carbon” and appeals more experience and outdoor lifestyle.

More outdoor bicycle corporations attend the Sports Show this year, especially GIANT and other great brands which bring technology and creation that will be a spotlight; skating corporations keep a scale no less than last year. In totally, nearly one hundred corporations will attend, with 30% skating and 70% outdoor. It is expected that the number of corporations will increase rapidly in the early of next year.

What are the new service thoughts put forward by the area of outdoor, bicycle and extreme skating in 2013 Sports Show?

After the close of 2012 Sports Show, we communicated and discussed



with exhibited corporations and did some surveys. In 2013 Sports Show, despite of “Green and Low-carbon”, we bring out “technology” and “interaction”, which mean designers from universities or institutes home and abroad will cooperate with companies. For instance, we build cooperation with Tianjin Academy of Craft Art and Beijing Sports University, and reveal the whole process from theory to design, from shell fabric to production, promoting the latest products and technology through experience and interaction.

It will damage the industry future when domestic outdoor corporations are lack of production standards and their products have poor quality. As one of the hosts of Sports Show, CSGF will support the production of sporting goods standards, improve products quality, and make consumers recognize this market segment.

Moreover, organization committee tries to cooperate with local sports industrial park and integrates sports industry recourses, guiding cooperation between corporations, expanded reproduction and capital connection.

Qi Yulin

Director of Outdoor, Bicycle and Extreme Skating Zone in China Sports Show

Badminton Market: Behind the Prosperity



I was in charge of the area of tennis and badminton in 2011 China Sports Show. Before that, in my eyes, badminton market was very prosperous and every badminton gymnasium was full of fans. Apparently, badminton developed healthily, but after I got into it and found many problems behind the prosperity.

Although some giant brands were expanding the market many years, badminton was still an emerging market with great potential. Even though giant brands took bigger market share, plenty of small businesses were still willing to develop in this compressed and attractive market.

For badminton market, more brands coming benefited the whole market and brought diverse factors. However, immature market and low access led to uneven brand levels when it attracted more brands. From the exhibition of Sports Show and market survey, we could see small brands were eager to break through. Limited by ability, the production and sales of small brands were lack of standardization, which caused market confusion.

At present, most of the badminton enterprises used mode of individual workshop. Meanwhile, small brands had a weak competitiveness, and distributors made small-scale order first

and then pick up goods after selling out, which brought about uncertain delivery cycle. As to mature sport like outdoor sport, distributors could order on a large scale periodically, which means a stable and prosperous market. After all, uncertain order cycle impacted not only market stability but also the number of distributors.

In 2012 Sports Show, badminton orders all over the world were more than ever, even some oversea clients without badminton business also took part in this show. On one hand, Sports Show enhanced promoting and spectator invitation; on the other hand, clients returned periodically, which was a

good opportunity for badminton market development, especially international badminton market.

Compared to other mature sports, there were still many channels to be opened for badminton promotion in Sports Show. We needed to open these channels and open more badminton market in other countries; for those countries in cooperation, we needed to enhance the relationship and make

badminton market abroad stable and prosperous.

Compared to high end sport such as outdoor sport, badminton was easy to access without high cost, and that was why badminton was popular. At present, badminton level in civil had been beyond junior stage, high levels required senior equipment and square, which promoted the whole badminton market to move to the high end. During

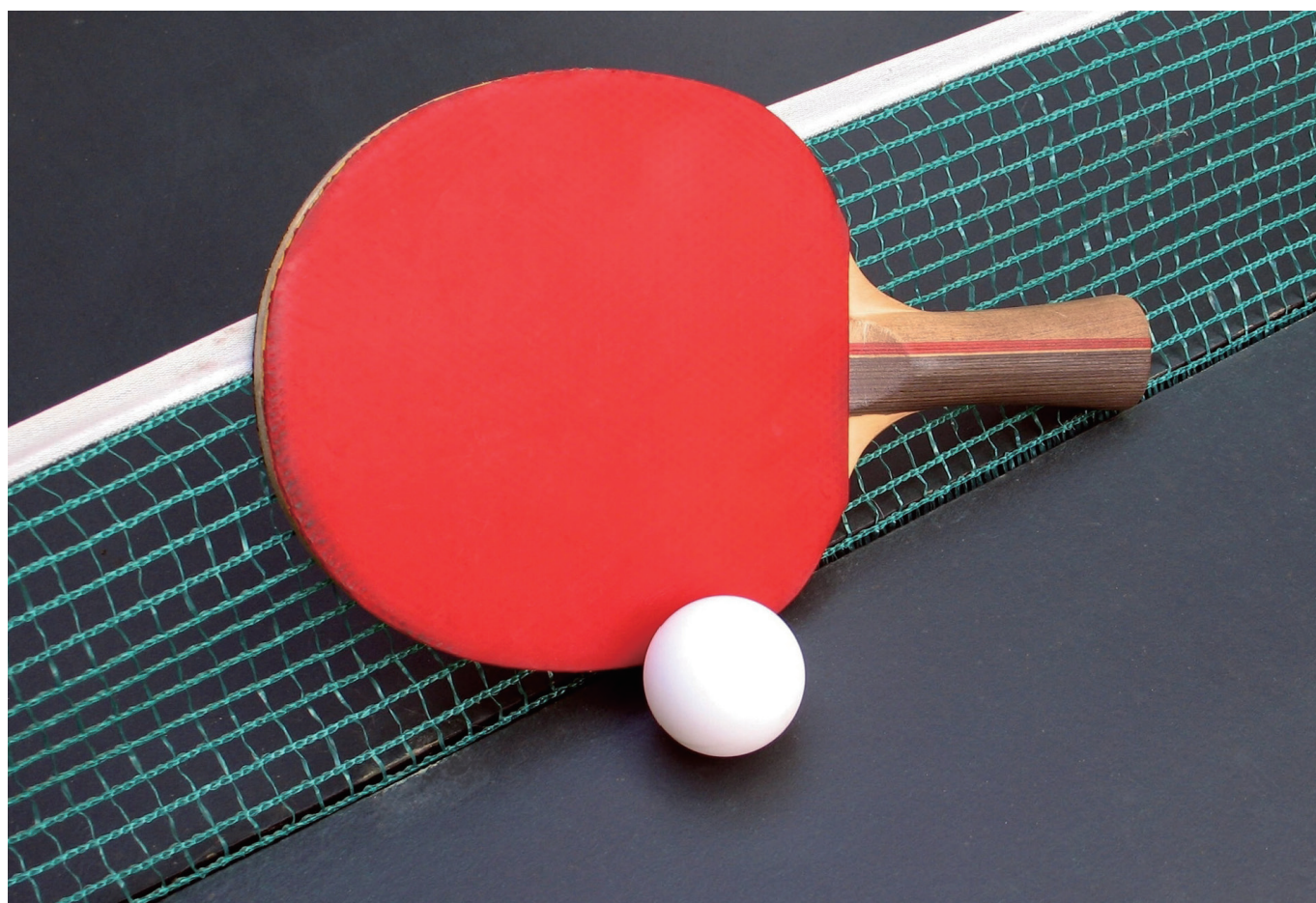
this stage, it was important to set up regulations and order for badminton market, and then integrate badminton resource in the market and promote it.

Nowadays badminton market still had some problems: lack of channels and promotion, low quality distributors and so on. Only if we solved these problems and built a market with regulations and stability, badminton sport would get a better development.

Sun Li

Director of Tennis and Badminton Zone in China Sports Show

Chinese Table Tennis Market: Less People Doing Pioneering Work, More People Keeping It Going





20 years ago, a Hongshuangxi table tennis bat was enough for a fan. Nowadays, a professional fan needs two or three blades, several pieces of rubber, a fine bat bag, several table tennis balls, a fashionable satchel, a pair of professional table tennis shoes, a set of table tennis clothes, and perhaps a special mask.

Blades are very important for fans. Chinese consumers pay more attention to bats' function and appearance

10 years ago, Chinese people did not use to use table tennis rubber while they used to use gum plus sponge. In their eyes, the best rubber was Chinese gum plus Japanese sponge. 5 years ago, people used to check whether the gum and sponge stucked one another. Nowadays, consumers pay attention to the combinations of Chinese products, Japanese products

and German products. Dealers want to sell rubbers as shavers. Chinese manufacturers want to buy high-purity rubber and other materials overseas and produce their ideal products. Foreign manufacturers want to meet Chinese consumers' demands.

Strictly speaking, the current table tennis ball is not professional due to the crack of the ball. Chinese manufacturers need to master international standards of celluloid balls and try to dominate the seamless ball market.

Nowadays, no one uses plastic bags, nylon oxford bat bags or square satchels. Backpacks and rolling bags are more popular.

With the development of professional venues, no one wears leather shoes now. Light and slim table tennis shoes become popular. Chinese table

tennis stars' shoes are made with 3D measurement system and dynamic capture system.

Table tennis clothes become functional. They absorb moisture and release sweat. They are colorful and fashionable.

Table should be fashionable. Chinese consumers like tables with spray paint. European consumers like tables made of melamine. There are tables in companies, common houses, and outdoor public places.

Barriers made of PVC are lighter. The venues will meet the demands of TV broadcasting.

There are more and more specialty stores with function zones and tables for trying to play table tennis. Online stores also come into being.

Zhang Lulu
Chief of Comprehensive Exhibition Zone of China Sport Show

Chinese Sports Brands Need to Adjust Their Products

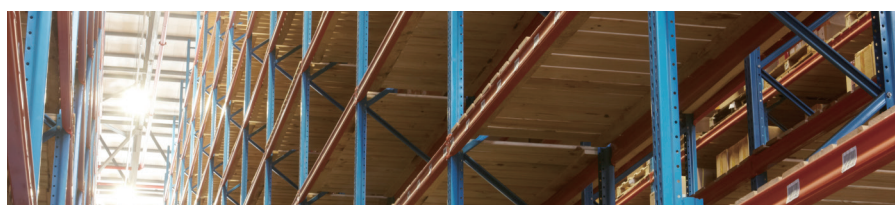
Recently, Chinese sports brands like Li-Ning, Peak and Anta closed their stores and their profits declined. After the Beijing Olympic Games and the extensive development stage, Chinese brands needed changes.

Chinese Sports Brands Face Harsh Winter

Up to the 30th of September, Peak reduced 1067 retail outlets to 6739 retail outlets in China. Meanwhile, the total orders declined 20%-30% in the second quarter order meeting of 2013. It was estimated that Peak's net profits would decline greatly because of inventory adjustment and weak economy.

Peak CEO Xu Zhihua said that it was sensitive to close stores, but it would finally result in the survival of the fittest.

In the first half of 2012, although Li-Ning opened 248 stores, Li-Ning closed 1200 stores after the profit evaluation and the



management adjustment. Up to the 30th of June, Li-Ning reduced 952 stores to 7303 stores, including common stores, flagship stores, factory stores and discount stores. At the same time, Anta also closed 110 stores.

In Beijing downtown areas like Xidan and Wangfujing, reporters found many Chinese sports brands' sales promotion ads. Compared with fashion stores

and international brands' stores, fewer customers visited Chinese sports brands' stores.

Mr. Xiong Xiaokun, a researcher of light industry, said that Chinese sports brands had to give up their former development modes due to the increase of labor cost and rents and product homogeneity.

Problems Caused by Crazy Expansion

In the last few years, Chinese sports brands have experienced the explosive growth with the opportunities brought by the Beijing Olympic Games, such as sports enthusiasm, sponsorship, ads promotion, and stock market.

In the past several years, many Chinese sports brands opened a large number of stores in the second-tier cities and third-tier cities. On one hand, it was a performance indicator for stock market. On the other hand, these brands grabbed the market share in this way.



Mr. Jiang Yunlu, an Internet marketing expert, said, "Many Chinese brands do not pay attention to the characteristics of products, so product homogeneity causes intense competition among these brands. Many stores are not

effective because of bad management and bad profits."

In the first half of 2012, top six Chinese sports brands' inventories reached 3.721 billion RMB Yuan while the

inventory had reached 3.699 billion RMB Yuan by the end of 2011. Among these six brands, 361° and China Dongxiang's inventories decreased a little while Peak's inventory increased

25.65% to 529 million RMB Yuan.

In Mr. Jiang Yunlu's eyes, besides product homogeneity, Chinese sports brands also faced the competition from

fashion brands. Chinese customers have had more choices with the emergence of fashion brands.

Chinese Sports Brands Face Reforming Pressure

In order to solve the problems, Chinese brands should first position themselves, adjust the product structure and strengthen the characteristics of their products. In Mr. Xiong Xiaokun's eyes, Chinese sports brands faced double pressure from domestic market and international market. On one hand, many Chinese brands intensely competed in the domestic market. On the other hand, international brands like Nike and

Adidas entered the second-tier cities and the third-tier cities through the sales promotion. Therefore, Chinese brands should position themselves, find development ways, adjust the product structure and promote themselves with their unique products.

Secondly, with the development mode of scale expansion, Chinese sports brands like Li-Ning have got in trouble. They should not occupy the market

by opening more stores. They should improve stores' profitability through their channels, promotion and services.

Thirdly, with the development of Internet and new media, Chinese brands should pay more attention to the application of E-commerce and try to reduce promotion cost. In this way, Chinese brands may win over price advantage.

Source: International Business Daily

The Review of Chinese Sporting Goods Industry in 2012: Realignment and Survival of the Fittest



At the 18th CPC National Congress, sports governing bodies were required to develop National Fitness Program and promote the all-round development of sports for all and competitive sports. This was also the requirements for the Chinese sporting goods industry.

In recent years, Chinese sports industry annually increased 22.6%, ahead of GDP. The proportion of sports industry and the related industry in GDP increased to 0.55% from 0.46% in 2006. Mr. Ma Jilong, director of China Sports Equipment Administrative Center and deputy president and General Secretary of China Sporting Goods Federation, said, "The proportion of sporting goods industry in sports industry is about 80%, so it plays a key role in the development of sports industry."

While the whole Chinese economy was going down, many industries faced troubles. Mr. Ma Jilong said to reporters, "With the influence of the economic environment, Chinese sporting goods industry enters a period of readjustment with its growth rate slowing down." Chinese sporting goods manufacture industry increased 10% in 2012, a little higher than GDP growth rate and lower than the growth rate in 2011, 2010 and 2008.

According to the status quo of sporting goods industry, China Sporting Goods Federation made researches and found the main factors about the development of Chinese enterprises.

Firstly, with the labor cost going up, Chinese enterprises faced great pressure. Chinese average labor cost increased 20% in 2011, and inflation quickly increased the price of raw and semi-finished materials. Facing the social trends of energy conservation



and emissions reduction and the marketization of energy price and interest rate, Chinese small and middle-sized enterprises were difficult to cut their costs.

Secondly, low international market demands caused developed countries' trade protectionism. Less orders from European markets and USA market brought troubles to sporting goods enterprises. In many Asian emerging markets, local enterprises took over the industrial transfer from developed countries due to the low labor cost and gradually met the local market demands. This greatly influenced Chinese enterprises' export.

Thirdly, Chinese sporting goods enterprises used to focus on scale expansion, but they did not improve the requirements for the brands and product quality. They also lacked innovations in products and markets. They should adjust product structure, build brands and strengthen their innovations.

Besides the above-mentioned three factors, the strong expectation for RMB

appreciation, the current monetary policies, and financing difficulties all hindered the development of Chinese sporting goods enterprises.

In 2008, the global financial crisis influenced the economic development of China and the development of sporting goods industry. Nowadays, similarities and differences existed when comparing the new financial crisis with the last crisis.

In Mr. Ma Jilong's eyes, both financial crises entered China and greatly influenced Chinese sporting goods industry.

In 2008, Chinese sporting goods industry passed the financial crisis due to the influences of the Beijing Olympic Games and the great market demands. Nowadays, the financial crisis, the increasing labor cost, and the lack of market demands all put Chinese enterprises to the test.

Source: China Sports Daily

Chinese Sporting Goods Industry Should Focus on the Idea of Putting People First



With the development of Chinese sporting goods industry, people are familiar with Chinese brands like Li-Ning and Anta. Extensive expansion has made them get in trouble. This is common during the development of Chinese Economy.

To make it clear, sporting goods industry is not equal to sports industry. Sports industry consists of sporting goods industry, public sports service and sports performance industry. They are mutually dependent and interacting.

Seen from the aspect of enterprise management, the problems that Chinese enterprises have faced have something to do with their market assessment, marketing strategy, and brand culture.

The current structure of Chinese sports industry shows that China lacks sports consumption and Chinese performance market is not mature. All these factors limit the development of Chinese sporting goods industry.

In 2008, the proportion of Chinese sports industry in GDP was about 0.52% while the percentage was usually over 1% in the developed countries. This means that Chinese market has great potential and opportunities. If more and more people take part in physical activities and the public benefits from the development of sports cause, sporting goods industry will surely get promoted.

Therefore, Chinese sporting goods industry should focus on the idea of Putting People First.

Source: People's Daily

“Running Industry” Can Produce Great Market Value

Global sports equipment, apparel, footwear and bicycle sales were valued at 333 billion USD for 2011, in which running took up 30% with about 100 billion USD sales.

Running industry gets vigorous as running becomes more and more popular. It benefits sports equipment producers, event sponsors and other industries. Many basketball shoes ads used to be played on CCTV Channel 5, however running products ads turn up now. Almost all sports brands have running series, which reveals running industry's great value.

Running products: are very popular

Running products have become the best-selling category in the world. The wholesale of Nike 2011 running products was valued at 2.8 billion USD, increasing by 30%.

Running is also a clear winner in China. Zhang Qing, CEO of key-solution Sports Consulting Co., Ltd., says: running industry becomes hot because of popular running sport and distance running events, “jogging shoes are profitable, accounting for 80% of sports footwear sales. And running is popular with little location restraint and diversified space. Therefore, it is not strange that running products occupy more than 30% share.”

Explosive running communities, such as

www.runningpark.net, www.running8.com, www.douban.com/group/runners, www.lepaoclub.com, www.ipaobu.com.cn, forum.freemarathon.org, and other brand organizations, for instance, Li-Ning iRUN club, New balance RUNFF, www.51running.com, www.quyeba.com and Nike runner club demonstrate that running gets hot increasingly. As the biggest running website, www.running8.com had 30000 members in 2010 but grew to 80000 a year later and 110000 active members now.

Thousands of runners form huge running consumers. According to data from “senior runner”, running more than 5 kilometers each time and at least 3 times a week, runner needs to buy a pair of new running shoes every 3-5



months while a suit of running specific equipment is valued at 6000 Yuan.

Enterprise marketing: guide the fashion

Compared to focus on basketball, more and more sports equipment producers are aiming at running market, which is the most obvious change in sports brands' competition.

Chen Entang, deputy director of economy department of General Administration of Sport, says that: “compared to basketball, running is easier to connect with consumers’

lifestyle, because everyone can take part in running.” Besides of basketball, big running market attracts more and more sporting goods producers home and abroad.

Though various activities, such as 10 kilometers running, night running, running club, Nike promotes running to be a part of life and makes consumers experience products and service completely. “Night running”

is considered as a fashionable city lifestyle. Like Nike and Adidas, Li-Ning puts forward running club and training camp, promoting products by experiential marketing.

As running apparel and other products get stylish, people love running is more than before. Therefore, sports brands begin to expand market by cultivating running culture.

Marathon events: form industry chain

There are 25 marathon and half marathon races approved by Chinese Athletic Association throughout 2012, and about 40 races if adding some invitational tournaments, which means that there will be a race every 10 days. As to the most well-known Beijing Marathon, it takes only 94 hours to reach the maximum number of 30000 participants this year. Almost every marathon race has the most participants. Compared to 31 marathon races in a whole year, marathon economy has wider space to explore.

Taking 2010 New York Marathon for instance, participants and spectators reached about 1 million, with 62370 gallon water, 32040 gallon sports drink,

2.3 million paper cups; 60000 energy bars at 18 miles site; 137 indicators and 106 time clocks at 24 depots to show time to participants; 52000 medals, 60000 blankets and 52000 set meals for runners who reached the end, accompanying 1200 ambulances.

Smart companies find opportunity from these numbers. Although marathon organization is an extremely complicated thing, supply and value chain hide behind each marathon race. For example, Shanghai and Guangzhou Marathon attract 16 sponsors respectively.

An international event is the best platform to show brand. Many

corporations send teams to take part in marathon races nowadays, slogan and neat team are the best way to show enterprise image.

Leading market research company NPD released global sport market report 2012, this was a record year for the sport market with an estimated global growth rate at +5% (4% was during 2005-07), and running market would continue developing.

By Xiao Wen



The Latest Five-Year Plan for Public Sports Facility Construction Released



The latest five-year plan for public sports facility construction is released by National Development and Reform Commission and General Administration of Sport on 10th. Central and local government will invest more into public sports facility and try to promote it during the new five-year plan.

Plan requires constructing sports basic public service network covers city and countryside, setting up complete sports public facility operation system, ensuring rights of physical activities, enriching spiritual and cultural life, forming healthy lifestyle, improving national physical fitness as well as health level and life quality, promoting all-round development of human being, social harmony and civilization progress.

The aims in plan are as follows:

public sports facility will achieve great development, and sports field area per capital will be more than 1.5 m² until 2015. Every counties has public sports field if possible; more than 50% counties (cities or districts) have fitness centers; more than 50% avenues (towns), communities (villages) have convenient and practical sports facilities.

So the main construction task in plan includes: constructing public sports fields in Midwest counties without medium and large sports facility; constructing medium and small fitness centers in counties with sports field per capital less than 1 m², that is comprehensive indoor fitness gymnasium which can support various mass sports activities without fixed stands; continuing to carry out "Farmers Sports Project" in Midwest villages without public sports fields; supporting

setting up a simple hardening basketball court as well as a pair of basketball stands and 2 outdoor table tennis tables.

Plan indicates that local governments are responsible for basic public service sports facility and ensure the investment; complete preferential policies on finance, tax, banking and land, and activate social force to supply sports service; encourage agencies and enterprises to increase investment and the number of public sports facility.

According to the plan, central government will supply special grant year by year to county sports fields and fitness centers.

Source: www.cfi.cn

Report on the Business Value of Chinese Sports Industry Released

According to Report on the Business Value of Chinese Sports Industry released by hupu.com and Sinotrust, residents in the first-tier cities and the second-tier cities have great enthusiasm in sports. Moreover, residents in the second-tier cities have more leisure time than those in the first-tier cities, so they take part in more physical activities and recreational activities.

Residents in the first-tier cities do not have enough leisure time due to rapid pace of life. Among them, 12% do not take part in physical activities while over 90% of residents in the second-tier cities usually take part in physical activities.

Residents' enthusiasm in sports can influence the development of sports industry, so it is necessary to take measures to encourage residents in the second-tier cities to participate in physical activities.

The Beijing Olympic Games has brought great social benefits and economic benefits and provided more development space for Chinese sports industry. The direct revenue of sports industry brought by the Beijing Olympic Games is about 3 billion US dollars while the indirect revenue is about 5.4 billion US dollars, which makes GDP increase 0.5%.

During the post-Olympic period, Chinese sports consumption increases quickly, so more investors enter Chinese sports industry. Nowadays,



there are about 20,000 companies in the sports performance industry, fitness and recreation industry, sports skill training industry and sports industry. The total investment is over 200 billion RMB Yuan and the total sales revenue is over 60 billion RMB Yuan.

During the post-Olympic era, Chinese

governments promote National Fitness Program, so there are more sports facilities and venues in the cities and communities. Chinese sports market has great potential.

Source: China Securities Journal

The 7th Generation Store of Peak Debuts



Mr. Xu Zhihua, CEO of Peak, says that the new designed 7th generation stores have debuted in some places and there will be about one thousand stores finishing image update until the end of 2013.

The 7th generation store applies internationalized design and covers at least 100 m², putting basketball at the core and showing specialization and serialization, with better visual impact

and buying experience.

Mr. Xu Zhihua indicates: "in fact we set out to deal with the market change from last year. Though optimizing channels, increasing profit of each store, investing more into design and research and other measures, we want to revive at first during industry fatigue period in the next 2-3 years by improving reaction and flexibility of the ends."

It was reported that the number of Peak store decreased by around one thousand during the first three seasons. Mr. Xu Zhihua comments: "media is sensitive to closed stores but it is an optimized process from the view of industry."

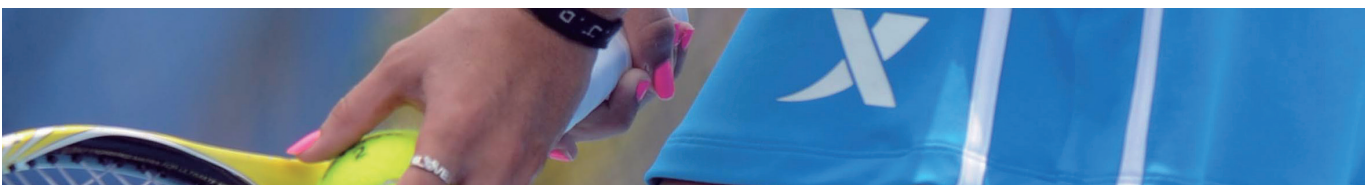
Mr. Xu Zhihua thinks that the need of Peak internationalization can't be met by current business area or image.

Zhu Qinghua, researcher from CIConsulting light industry, says that store reformation is a smart selection. "Many brands stores are lack of collection style on exhibition, due to ambiguous positioning in the early days." Mr. Zhu Qinghua continues, "And then many stores don't change image and show only on sale information, which leads to consumers' visual exhaustion."

"Integrating store resource and improving single store profit are our ultimate purposes." Mr. Xu Zhihua concludes, "Construction adjustment and optimized channels are measures responsible for distributors, so they can invest more into profitable stores."

Source: www.xinhuanet.com

Xtep Launches Individualized Customization and DIY System



In the second quarter order-placing meeting of 2013, Xtep launches online DIY Design System. Some experts point out that this marks the new era of Xtep's individualized customization.

To get some online market share, Xtep's E-commerce Center holds online distributor meeting. Many experts take part in the meeting, including Mr.

Zhang Yong, Tianmao President. Mr. Xiao Lihua, Vice-president of Xtep, said, "E-commerce will be one of our key future investment fields."

Xtep is not the first Chinese enterprise that launches DIY system. Four months before the meeting, Peak has launched IDX system. Mr. Xu Zhihua, Peak President, said that the idea of IDX came from the high inventory dilemma.

This is also called the transition from B2C to C2B.

Mr. Zeng Ming, an analyst from Alibaba Group, said, "C2B will change the business mode and more enterprises will adopt it. Individualized customization will be a trend."

Source: www.cnxz.cn



2013(第31届)中国国际体育用品博览会

2013年5月31日 (周五) – 6月3日 (周一)

北京·中国国际展览中心 (新馆)

New China International Exhibition Center, Beijing

www.sportshow.com.cn

weibo.com/chinasportshow

CHINA SPORT SHOW