



THE SPORTS GOODS MARKET

Central Europe

Volume 3



FOCUS ON



AUSTRIA

SWITZERLAND

EXECUTIVE SUMMARY



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FSPA Sporting Goods Report

CENTRAL EUROPE

The third of the FSPA European Sports Research projects is the Central European Report, covering the larger 5 countries **France, Italy, Austria, Switzerland and Germany** and consisting of 4 volumes:

Executive Summary – AUSTRIA & SWITZERLAND



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Executive Summary

THE SPORTS GOODS MARKET IN CENTRAL EUROPE

AUSTRIA AND SWITZERLAND

394 pages of English text and charts on the Italian sporting goods market

- Case studies of successful and unsuccessful market penetration and related tips
- In-depth analysis of 101 significant players (see list of company profiles further down)
- Ten product categories studied from top to bottom
- Consumption trends and effective marketing strategies
- Comprehensive market and foreign trade statistics
- Listings of 162 executives interviewed and about 250 other distributors and retailers
- Third in-depth report on the mature markets in and around the Alps after France and Italy, to be followed by Germany

Background and Methodology

We are pleased to present here a uniquely comprehensive market report. This big report of nearly 400 pages, including the listings, must be easily the largest ever published about the Italian sporting goods market. Its exceptional length has caused a delay in its publication, for which we apologise. It has turned out to be unavoidable because of the relatively diverse and complex structure of the Italian market, which is less homogeneous and more fragmented than the French one and other mature markets in Europe.

It has also been caused by the passion of the author for the subject and the fact that there are so many different companies in Italy that operate in the sporting goods sector, even though they are relatively small by world standards, and that have an interesting story to tell. The author, Eugenio Di Maria, is the editor and publisher of SPORTING GOODS INTELLIGENCE EUROPE. He is originally Italian and has been following Italian sporting goods companies since he began to work for SportStyle in Paris in 1978. On the other hand, as an expatriate who has been stationed outside Italy since 1973, he has gained a certain degree of detachment that allowed him to be objective about the dealings in this country.

This report is the second volume of our research into the major markets located in the Alps or bordering them. Covering France, Italy, Germany, Austria and Switzerland, this series completes a five-year research project sponsored by the British Federation of Sport and Play Association and by the British Chambers of Commerce. This project has taken us through 38 other countries around Europe, from Ireland to Poland and from Finland to Turkey, and two in Central Asia (see the chart after the table of contents). Including the present volume on France, this makes up a total of 4,262 pages of research published so far.

The next two volumes will cover Germany, Switzerland and Austria. They are expected to be published between September and October 2009.

We are using here the same methodology and the same definition of the market that we had previously applied to the countries of Eastern, Northern, Southeastern and Southwestern Europe. The use of a similar check-list of topics being covered more or less in depth in each country report allows the reader to compare and benchmark one market against the other, providing useful cues to maximize growth and market penetration in each one of them.

We start each country report with a discussion of the general economic background, followed by the available data on sports participation and on governmental initiatives intended to promote it. This is followed by a set of import-export statistics for the last three years and by a description of the major

national manufacturers and suppliers. We then analyse the general size and structure of the national sporting goods market and the market situation in ten major product categories, one by one.

Each country report continues with an analysis of the supply chain at the wholesale and retail stages, accompanied by profiles of major suppliers, distributors and retailers. We then review briefly the characteristics of the national consumer and discuss some of the marketing actions used to promote the sale of sporting goods products. Each country report ends with a series of recommendations on how to optimize market penetration, although some tips are implicitly given throughout the report, in the introductions and the in the final remarks.

As with our previous country reports, we have followed a two-pronged approach in our research. On one hand we have collected all the available information that we could find published in printed documents and on the internet for each country, mostly relying on local researchers and on Searce, who are experts in the analysis of foreign trade statistics. This stage included the provision of selected statistical data by market research firms.

At the same time, several experienced business journalists working with Sporting Goods Intelligence have interviewed scores of leading French industry executives and visited many different sporting goods stores around the country. The names of all the individuals whom we have interviewed in are listed in the appendices along with many other useful names and addresses of distributors, retailers and industry experts.

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- 2.1 General statistics on sports participation
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- 4.1 Best possible estimates of the size and growth of the sports goods market in volume and value, particularly at the retail level. Evolution since 2004, with an in-depth analysis based on multiple sources and on different parameters
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For each of the above sports categories, we analyze:

- Availability of sports venues or resorts and plans for new ones
- Development of participation levels
- Dynamics in club memberships, permits & licenses
- Market size and growth for the related products
- Major brands and ways in which they are distributed
- Major specialist retailers
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Extensive listings of all the people interviewed, other distributors, other retailers, other contacts etc.

The FSPA's EUROPEAN SPORTS GOODS MARKET ENCYCLOPEDIA

The following reports have been published following the same criteria
and the same outline.

Eastern Europe (2005): Poland, Hungary, Czech Republic, Slovakia

The CIS countries (2006):

Vol. 1 - Russia

Vol. 2 - Russia

Vol. 3 - Ukraine, Kazakhstan, Uzbekistan, Belarus

Northern Europe (2007):

Vol. 1 - Denmark, Sweden, Norway

Vol. 2 - Finland, Baltics, Iceland

Vol. 3 - Belgium, The Netherlands, Luxembourg, United Kingdom, Ireland

Southern Europe (2008):

Vol. 1 - Slovenia, Croatia, Serbia, Bosnia-Herzegovina, Montenegro,
Macedonia

Vol. 2 - Romania, Albania, Bulgaria, Moldova

Vol. 3 - Greece, Turkey, Cyprus, Malta

Vol.4 - Spain, Andorra, Gibraltar, Portugal

Central Europe (2009/10):

Vol. 1 - France

Vol. 2 - Italy

Vol. 3 - Austria, Switzerland

Vol. 4 - Germany



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