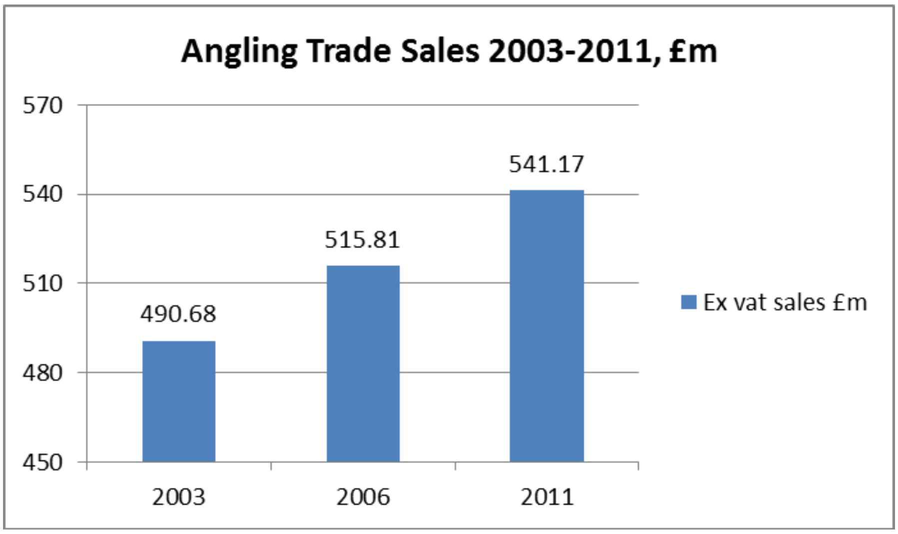
ATA Tackle Trade Survey 2011

The results of this survey are based on a questionnaire designed by the Angling Trades Association that was distributed in 2011 to over 1,000 companies and individuals currently active in the trade.

The respondents (15%) were requested to input their results into the online survey website SurveyMonkey (www.surveymonkey.com), which provided an automated response and analysis of all data it received. The responses were then interrogated closely by the independent research consultancy Searce (www.searce.eu) to generate the results which follow in this report.

The results take cognisance of the previous calculations from earlier surveys, undertaken in 2003 and 2006 by DHP Ltd, in order to provide a comparison and continuity across the decade. Unless specified, the figures relate specifically to retail figures for the specialist fishing sector only. The last two tables of import and export data are taken from Eurostat and do not form part of the SurveyMonkey responses.

1. **Value of the angling trade in 2011 £541.17m (ex VAT)**

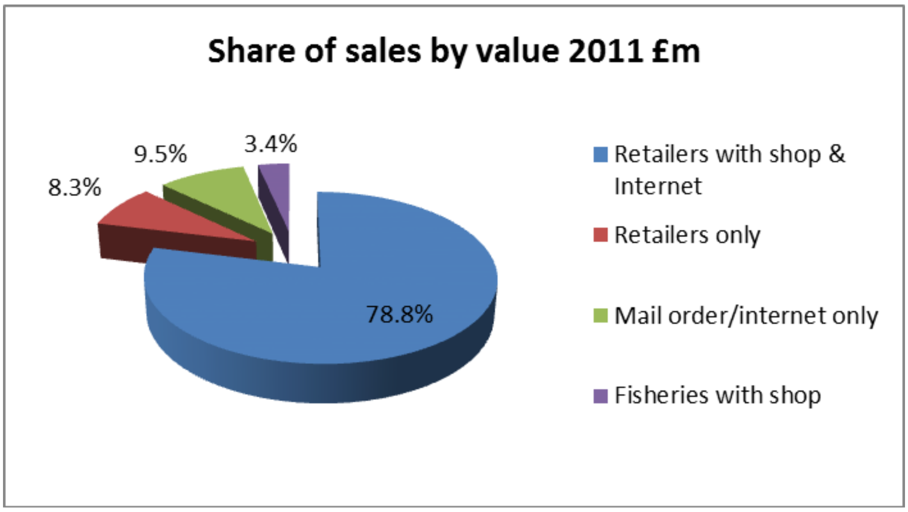


Sales in 2011 were 4.9% higher than in 2006. It is likely that the market peaked in 2008 and fell in 2009, with a flat or modest increase since then - reflecting the impact of the financial crisis on this market - and the majority of other leading consumer goods markets.

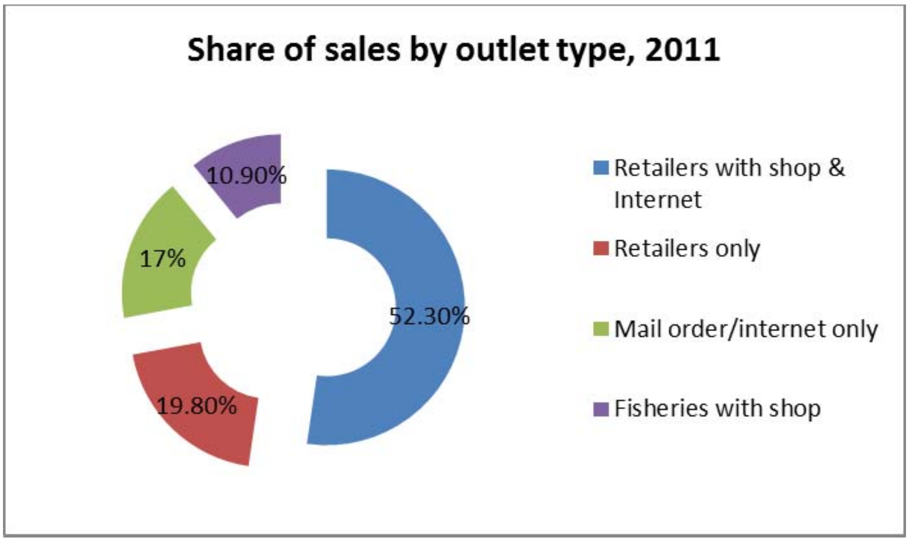
Meanwhile, the **average turnover** of each retailer was estimated to be **£218,653 in 2011,** compared to £172,830 in 2003 and £190,827 in 2006. Over this period, the number of retailers fell from 2,839 in 2003, to 2,700 in 2006 and 2,472 in 2011, reflecting a trend towards larger retailers.

2. **Breakdown of trade by channel**

Of the 2,472 specialist retailers in 2011, over half consisted of retailers with a website who accounted for almost 80% of all trade. This takes no account of the growing numbers of non-specialist (high street) retailers now selling fishing tackle.



Compare this chart to the share of sales by type of outlet:

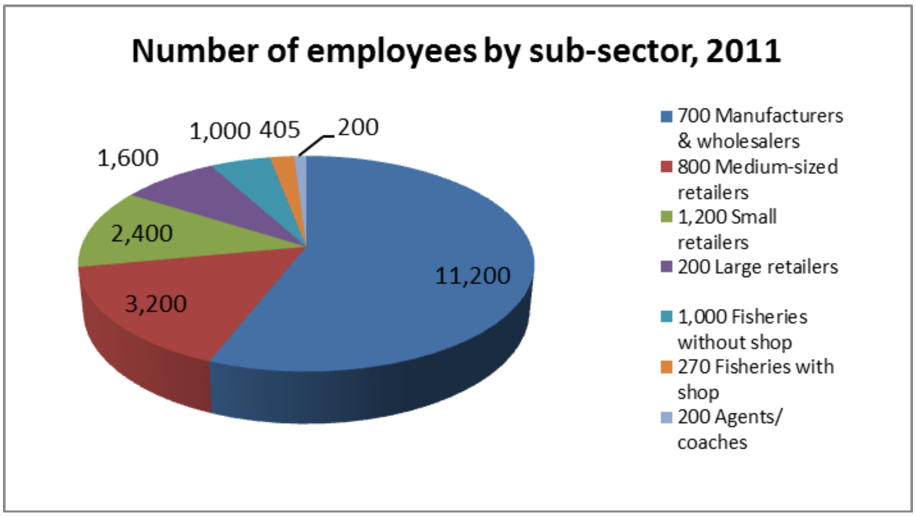


A further interesting point is that mail order/online sales were valued at £237m or 43.9% of all specialist sales in 2011.

3. **Number of people employed in the specialist sector**

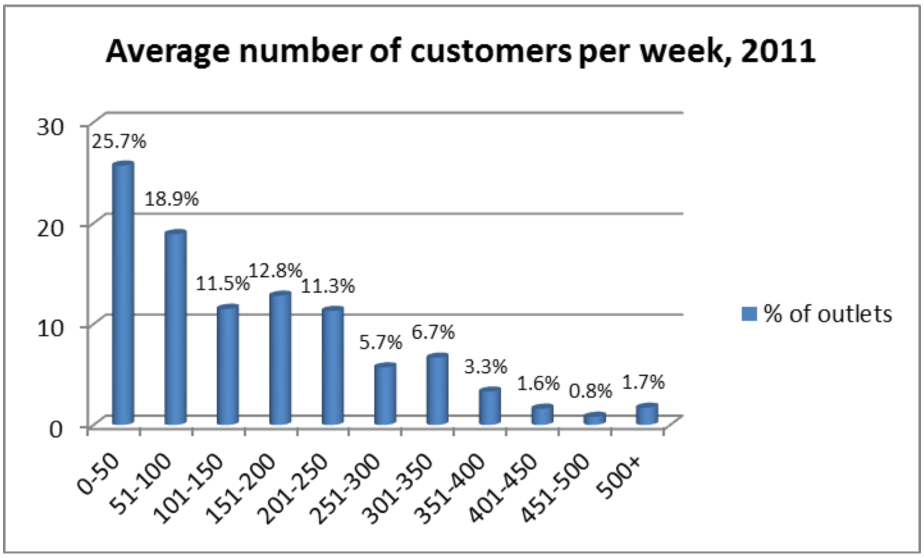
It is not clear which categories of employees were included in previous surveys, however the 2003 survey recorded 19,055 full-time and 9,622 part-time employees (26,677 in total) and the 2006 survey recorded 18,250 full-time and 5,440 part-time employees (23,690 in total).

There is a continuing downward trend in terms of the number of employees in the trade. 74% of all employees were full-time, compared with 71% in 2003 and 77% in 2006. The estimate for 2011 is 20,005 employees, of which 14,745 were full-time and 5,260 were part-time. This was estimated to be broken down as follows:



4. Customer Information

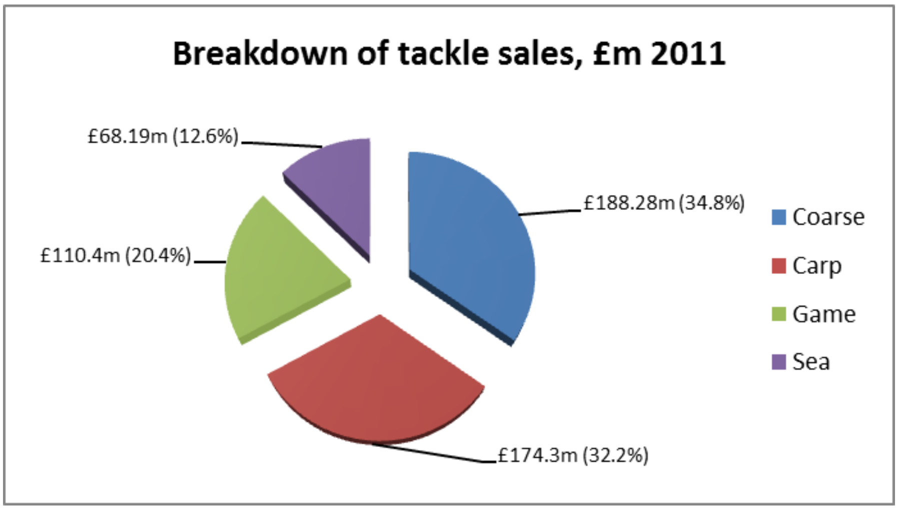
46% of all outlets had less than 100 customers per week and 70% of all customers spent £50 or less per week, as outlined in the next two charts. It reflects the importance of the aggregate value of small purchases to the trade.



Page 3 of 6

5. Sub-sector market values

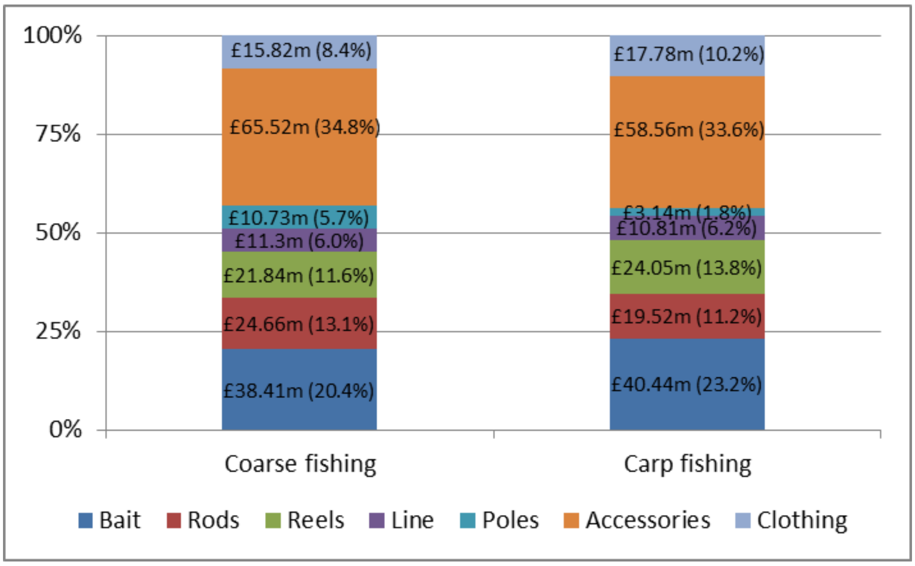
Broadly speaking, there has been an increase in the proportion of sales accounted for by carp fishing since 2003 and 2006, while coarse fishing sales have maintained their share and game and sea fishing sales have lost share, as per the following chart:



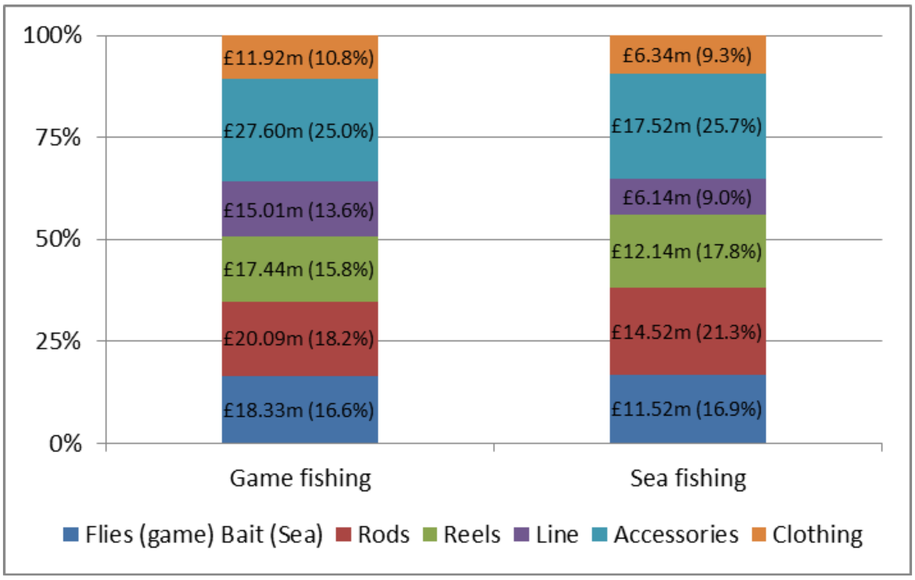
6. Sub-sector breakdowns by product group

Accessories are the leading product groups in each of the sub-sectors. Bait is the next largest product group for coarse and carp fishing, whereas rods represent the next largest product group for game and sea fishing, as the following two charts indicate:

Breakdown of coarse and carp fishing sales by product type, 2011, £m % share of total



Breakdown of game and sea fishing sales by product type, 2011, £m % share of total



7. Imports of fishing equipment

Imports of fishing equipment were broadly unchanged in value between 2010 and 2011, but volumes were significantly down. Mounted fishing hook imports have shown the greatest increase in value over the period. China was the dominant supplier of imports, accounting for almost 42% of all imports of fishing equipment in 2011.

Fishing imports	% value share of imports 2011	2010 value £ '000s	2010 volume tonnes	2011 value £ '000s	2011 volume tonnes	% annual change in value 2011 vs 2010
Fishing rods 95071000	26.2%	15,092.6	998.5	14,886.4	811.3	-1.4
Fishing hooks unmounted 95072010	3.4%	2,212.2	68.1	1,904.9	61.0	-13.9
Fishing hooks mounted 95072090	4.9%	2,523.8	284.6	2,807.4	352.7	+11.2
Fishing reels 95073000	16.2%	8,910.7	452.6	9,196.4	329.0	+3.2
Line fishing tackle 95079000	49.3%	27,648.8	4,032.1	28,055.4	3,543.1	+1.5
Product group total	100%	56,388.1	5,835.9	56,850.4	5,097.1	+0.8
Top 6 sources of imports						
China	41.9%	26,916.0	4,159.6	23,818.4	3,414.2	-11.5
Netherlands	7.6%	3,929.7	73.8	4,306.4	118.7	+9.6
S Korea	7.5%	3,003.4	72.7	4,267.8	88.5	+42.1
Germany	6.8%	1,827.8	174.2	3,872.9	300.9	+111.9
USA	6.4%	3,697.0	144.3	3,663.9	83.7	-0.9
Japan	5.0%	2,620.0	35.2	2,868.3	32.0	+9.5

Source: Eurostat. Values have been converted from Euros at £1=€1.20

8. Exports of fishing equipment

Exports of fishing equipment increased by 7.7% in value between 2010 and 2011, with unmounted fishing hooks registering the greatest increase. Meanwhile, exports of fishing reels declined. The Netherlands was the leading export destination.

Fishing exports	% value share of exports 2011	2010 value £ '000s	2010 volume tonnes	2011 value £ '000s	2011 volume tonnes	% annual change in value 2011 vs 2010
Fishing rods 95071000	17.7%	4,999.1	119.8	5,044.5	231.5	+0.9
Fishing hooks unmounted 95072010	4.3%	772.9	20.8	1,230.6	28.1	+59.2
Fishing hooks mounted 95072090	1.0%	250.4	19.8	277.3	29.6	+10.7
Fishing reels 95073000	6.7%	2,456.3	74.9	1,902.4	58.9	-22.6
Line fishing tackle 95079000	70.4%	18,004.0	870.3	20,077.9	903.5	+11.5
Product group total	100%	26,482.7	1,105.6	28,532.7	1,251.6	+7.7
Top 6 destinations of exports						
Netherlands	25.6%	6,596.6	272.2	7,308.7	276.1	+10.8
Germany	12.8%	4,205.1	164.3	3,649.2	151.2	-13.2
Italy	9.3%	2,197.8	77.8	2,650.1	97.6	+20.6
France	7.6%	1,923.2	69.1	2,169.6	75.1	+12.8
Ireland	5.8%	1,327.9	142.9	1,647.3	274.9	+24.1
USA	5.4%	1,389.2	41.7	1,529.8	24.3	+10.1

Source: Eurostat. Values have been converted from Euros at £1=€1.20

9. Contacts

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