

## INDIA'S SPORTS GOODS MANUFACTURING SECTOR

### *I. Introduction*

India's sports manufacturing sector stands at a critical inflection point. While the country has a long-standing legacy in producing quality sporting goods, particularly in clusters like Jalandhar and Meerut with brands like SS and SG being used by cricketers across the world, the sector remains under-leveraged in terms of policy priority, institutional support, and innovation-led growth.

The sporting goods sector is now administratively placed under the Ministry of Youth Affairs and Sports (MYAS) pursuant to the recent amendments to the Allocation of Business Rules, 1961. With this transition, MYAS is entrusted with responsibility over domestic sports goods manufacturing, athlete-centric product development, certification frameworks and procurement-linked quality reforms. At the same time, the Department for Promotion of Industry and Internal Trade (DPIIT) under the Ministry of Commerce and Industry continues to oversee trade promotion, export facilitation and industrial classification for the sector. This institutional alignment allows the sector's growth to be driven by sporting performance and athlete needs, while being simultaneously supported by robust trade and export promotion architecture.

However, despite this improved structural positioning, the absence of a dedicated scheme for sporting goods continues to place Indian manufacturers at a comparative disadvantage vis-à-vis global competitors such as China, Vietnam and Taiwan, which benefit from specialized manufacturing hubs, integrated supply chains, and strong state-backed innovation ecosystems.

In light of the sector's inclusion under MYAS, it is now critical for the MYAS to fully institutionalize its leadership role by actively steering an athlete-centric manufacturing and innovation ecosystem, driving demand-side reforms in public procurement and creating integrated platforms for market access, R&D collaboration and MSME participation, while the DPIIT continues to strengthen the sector through its established mandates in trade and export promotion.

As the Government of India seeks to position the nation as a global sporting powerhouse through flagship initiatives such as Khelo India, the Fit India Movement and its ambition to host the 2036 Olympic Games, the sector's placement under MYAS creates a timely and strategic opportunity to integrate industrial, innovation, and procurement policies directly with India's broader sporting ambitions, ensuring that domestic manufacturing becomes a core enabler of sporting excellence rather than a parallel activity.

### *II. Background*

#### *1. What are classified as Sports Goods/Equipment?*

Sports goods or equipment refers to the gear used in officially recognized physical sports, such as cricket bats and balls, footballs, regulators and gauges for scuba diving, bicycles, surfboards or climbing harnesses.

However, it does not include clothing or shoes worn specifically for those sports, like gymnastics leotards and football boots. It also does not cover items used in mind-based activities like chess, motorized or electronic sports such as model powerboating, or coordination-focused sports like billiards.<sup>1</sup>

Sports Goods and Equipment can be broadly divided based on the following:

- a. Depending on how it is used i.e. (i) equipment that is designated (balls in cricket or table tennis); (ii) equipment that is brought by a user (cricket bats or tennis rackets); (iii) equipment used on the field (nets or wickets); and (iv) other equipment (apparel, shoes, score boards).
- b. Sports equipment can also be separated based on competitive sports equipment and supplementary sports equipment based on how it is used.
- c. Types of Sporting Equipment:
  - (i) Bats (cricket, baseball), balls (soccer, cricket, basketball), racquets, padels, nets;
  - (ii) Helmets, gloves, pads, protective gear;
  - (iii) Gym & fitness equipment (e.g., dumbbells, resistance bands, benches);
  - (iv) Sports shoes, cleats, spikes, skates, snowboard, etc;
  - (v) Accessories & components;
  - (vi) Sports bags, grips, water bottles, training cones, whistles;
  - (vii) Scoreboards, refereeing tools, and timers;
  - (viii) Indoor & outdoor gear;
  - (ix) Table tennis tables, foosball tables, carrom boards, etc.;
  - (x) Goalposts, nets, turf items;
  - (xi) Adventure & recreation;
  - (xii) Camping, trekking, cycling, and climbing gear.

## 2. *Size and Scope of India's Sports Manufacturing Sector*

- a. India currently manufactures over 300 types of sporting goods, including equipment for gymnastics, outdoor sports, and related categories. Major production hubs are located across several states, including Punjab, Delhi, Uttar Pradesh, Tamil Nadu, Jammu & Kashmir, West Bengal, and Maharashtra.
- b. In 2023, India ranked 21st among global exporters of sports goods<sup>2</sup>, with an export value of US \$523.24 million in the fiscal year 2023–24<sup>3</sup>. Despite this respectable figure, it only accounts for less than 1% of the global sports goods trade which is estimated at over US \$65 billion annually. India's market share remains modest compared to leaders like China, the EU, and Taiwan<sup>2</sup>. Nevertheless, India's sports goods industry has demonstrated a robust compound annual growth, escalating from US \$402 million

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<sup>1</sup> <https://www.lawinsider.com/dictionary/sports-equipment>

<sup>2</sup> <https://www.ibef.org/exports/sports-industry-india>

<sup>3</sup> <https://www.india-briefing.com/news/indias-sports-goods-manufacturing-and-export-outlook-2025-36969.html/>

in FY 2016–17 to US \$546 million at its peak in FY 2021–22, then stabilizing at US \$523 million in FY 2023–24<sup>4</sup>.

c. Summary of country wise India’s sporting goods exports <sup>5</sup>



Source: Department of Commerce, Note: \*- April-June

- d. India acts as a hub for procuring inflatable balls and other sports goods, supplying major international brands like Mitre, Lotto, Umbro, and Wilson. In FY23, cricket equipment made 4% of India’s sports goods exports.
- e. Football equipment contributed 2%, while water surfing boards accounted for 1%. Between 2010 - 2020, India significantly boosted its export strength in products like table tennis, lawn tennis, and badminton equipment, seeing a thirty-fold rise in racquets-related exports. As of 2019, India’s share in the global tennis goods market stood at 1.2%, reflecting steady progress and growing global recognition.<sup>6</sup>
- f. This performance underscores a significant untapped potential. Strong employment (around 500,000 workers across MSME-led clusters), a skilled workforce, and deep-rooted hubs point to latent capability. However, quality inconsistencies, limited R&D, and fragmented certification protocols are constraining India’s ability to ascend to high-value markets. With structured policy support, especially in certification, innovation, and market access, India could realistically double its exports every 5–7 years and emerge as a strong global alternative to East Asian manufacturing centers.
- g. How much protective equipment can help in order to prevent injuries:

<sup>4</sup> <https://www.india-briefing.com/news/indias-sports-goods-manufacturing-and-export-outlook-2025-36969.html/>

<sup>5</sup> <https://www.ibef.org/exports/sports-industry-india>

<sup>6</sup> [https://www.ibef.org/exports/sports-industry-india#:~:text=Export%20Destinations%20India%20exports%20a%20wide%20range,in%20FY24%20amounted%20to%20US\\$%20189.49%20million.](https://www.ibef.org/exports/sports-industry-india#:~:text=Export%20Destinations%20India%20exports%20a%20wide%20range,in%20FY24%20amounted%20to%20US$%20189.49%20million.)

Sport	Main Safety Gear	Injury Reduction (%)
Cycling	Helmet	50
Rugby (American Football)	Helmet, shoulder pads	30
Hockey	Helmet, face cage	40
Boxing	Mouth Guard	60
Baseball	Batting helmet, chest guard	35

- h. How specialized sports equipment allowed within the rules of the game can help:

Equipment	Performance Upgrade	Research/Stat
Carbon fibre bike	Faster acceleration	Up to 15% lighter than standard bikes
Graphite tennis racquets	Higher swing speed and improved control	Up to 20% faster ball exit speed

- i. How instrumental equipment can increase effectiveness and efficiency:

Equipment	Main benefit	Average Improvement
Heart rate monitor	Avoids overtraining	12% better recovery
Weighted Basketball	Boosts passing power	17% stronger passes
GPS running watch	Consistent pacing	15% better pacing
Motorised foam roller	Speeds up muscle recovery	30% less soreness

### 3. Existing Bodies

- a. Sports Goods Manufacturers and Exporters Association (**SGMEA**):

- (i) A key industry body representing sports goods manufacturers, particularly in traditional hubs like Jalandhar, with key focus on advocates for the resolution of domestic and export-related challenges (e.g., GST, trade policy, certification) and liaises with government agencies on behalf of small and medium sports goods exporters.
- (ii) Plays a role in international trade promotion, standards compliance, and cluster development.

- b. Sports Goods Foundation of India (**SGFI**):

- (i) An NGO and advocacy body formed by the industry to address the issue of child labor in the sports goods sector with key focus on working with global buyers, NGOs, and the government to eliminate child labor from supply chains.
- (ii) It implements education, rehabilitation, and monitoring programs in manufacturing clusters.
- (iii) Supported by global initiatives like the International Labor Organization (ILO) and UNICEF.

- c. National Institutes (e.g., **IITs, NID, NSIC, NIESBUD**): Institutions such as the Indian Institutes of Technology (IITs) and the National Institute of Design (NID) play an important role in design

innovation, materials research, and incubation of sports tech start-ups. However, their engagement with sports goods manufacturing is currently project-based and not part of an institutionalized national framework.

- d. Bureau of Indian Standards (**BIS**): The national standards body under the Ministry of Consumer Affairs, BIS sets quality norms and certification standards for a wide range of industrial and consumer goods. While IS 15844 covers sports footwear, there is currently no comprehensive BIS standard framework covering the full range of sports goods and equipment.
- e. Central Leather Research Institute (**CLRI**): A constituent laboratory of the Council of Scientific and Industrial Research (CSIR), CLRI is based in Chennai and plays a major role in leather research, testing, and technology development. While not sports-specific, CLRI provides testing and material innovation services that are relevant to sports goods involving leather components such as gloves, balls, and protective gear.
- f. Central Institute of Hand Tools (**CIHT**), Jalandhar: An autonomous institute under the Ministry of MSME, CIHT focuses on training, design, and development of hand tools, including manufacturing support for precision components. Located in the heart of a major sports goods cluster (Jalandhar), CIHT's infrastructure and tooling services are occasionally accessed by sports goods manufacturers, particularly for moulds, dies, and custom tool fabrication.
- g. Process cum Product Development Centre (**PPDC**): Jalandhar & Meerut: PPDCs in Jalandhar and Meerut are among the few sector-specific institutions directly linked to the sports goods industry. These centres function under the Office of the Development Commissioner, Ministry of MSME, and offer product development, quality testing, training, and technical support for sporting goods manufacturers. However, their scale and visibility remain limited and they primarily cater to traditional manufacturing processes without integrated support for smart tech, federation compliance, or global certification readiness.

#### 4. Existing Schemes

At present, several schemes operated by different Ministries of the Government of India offer generic support to exporters, MSMEs, and manufacturers across sectors, including sporting goods. However, these are broad-based in nature and not tailored specifically to the needs of the sporting goods manufacturing ecosystem. The key schemes currently in operation include:

##### a. Market Access Initiative (MAI)

Implemented by the **Ministry of Commerce and Industry**, the MAI scheme provides financial assistance to Export Promotion Councils, trade bodies, and industry associations for undertaking export promotion activities. These include:

- (i) Participation in international trade fairs and exhibitions
- (ii) Market studies and research reports

- (iii) Buyer-seller meets and reverse buyer-seller meets
- (iv) Branding and image-building in foreign markets MAI support is typically routed through sector-specific EPCs, such as the **SGEPC** for the sporting goods industry.

**b. Market Development Assistance (MDA)**

Also administered under the Ministry of Commerce and Industry, the MDA scheme supports individual MSME exporters by reimbursing:

- (i) Airfare and freight costs for participating in overseas fairs.
- (ii) Costs for registration of products in foreign markets.
- (iii) Export promotion literature, product samples, and publicity.
- (iv) The scheme is intended to help first-time and small exporters overcome entry barriers to international trade.

**c. MSME International Cooperation (IC) Scheme**

Under the **Ministry of MSME**, this scheme supports MSMEs for:

- (i) Participation in international exhibitions and trade fairs.
- (ii) Delegation of trade teams abroad.
- (iii) Holding international conferences in India.
- (iv) Financial assistance is provided for airfare, freight, stall rentals, and promotional material.

**d. Technology and Quality Upgradation Support (TEQUP) Scheme**

Also operated by the Ministry of MSME, TEQUP supports MSMEs in adopting energy-efficient technologies and quality certification systems. Assistance includes:

- (i) Reimbursement of ISO 9000/14001/HACCP/CE certification costs
- (ii) Support for acquiring product quality marks such as BIS.
- (iii) Though not sector-specific, TEQUP can help sporting goods manufacturers improve production quality and meet global compliance norms.

While the existing schemes and support programs provide a valuable foundation for promoting exports and enhancing manufacturing capabilities, they are broad-based in their design and not specifically tailored to the unique requirements of the sporting goods sector. These schemes have laid important groundwork, but there is now an opportunity to build on them by introducing targeted interventions that reflect the evolving needs of the industry.

**5. Why the Sports Goods Sector Has Emerged as a Strategic Focus Area**

- a. India's sports manufacturing sector is at a pivotal crossroads where timely and targeted government intervention has the potential transform it from a largely MSME-driven export contributor into a globally competitive, innovation-led industry. Two key macro-contexts make government support both strategic and time-sensitive: (i) India's ambition to host major international sporting events; and global shifts in manufacturing and supply chains, especially the realignment away from China.

(i) India's Bid to Host Mega Sporting Events

India has already been awarded the hosting rights for the 2030 Commonwealth Games, and has formally expressed interest in hosting the 2036 Olympic Games, alongside strengthening its annual calendar of international and domestic competitions. These mega-events are not just about athlete preparation and infrastructure - they also involve a massive demand for sports goods, training equipment, volunteer kits, branding materials, and athlete support gear. Such events have a multi-year procurement cycle, involving:

- a. National and state tenders for certified competition equipment;
- b. Federation-specified technical gear for training and trial runs;
- c. Grassroots distribution of gear for host-city outreach programs;
- d. Uniforms, accessories, and protective equipment for officials and volunteers.

If India aspires to present itself as a self-reliant host nation, the sporting goods used in these global events must increasingly be Indian-made not just for symbolic reasons, but for economic, strategic, and reputational value. Scaling, certifying, and digitizing the sports manufacturing sector, with Government support, can lead to reducing imports from China, Taiwan, or Europe, and laying emphasis on both *Atmanirbhar Bharat* and *Make in India* narratives. Moreover, hosting such events offers an ideal launchpad for global brand positioning of Indian sports products. Many of the world's leading sports brands (e.g., Li-Ning from China or Asics from Japan) saw a surge in global credibility after supplying gear to Olympic or national events. The same brand legitimacy can be cultivated for Indian sports manufacturers.

(ii) Realignment of Global Supply Chains - India's Window of Opportunity

- a. Current exports of China:

Country	Revenue (in USD)
United States of America (USA)	6.27 billion
Japan	1.06 billion
Germany	1.05 billion
United Kingdom (UK)	799 million
Canada	857 million

The ongoing geopolitical reconfiguration of global supply chains, driven by the COVID-19 pandemic, U.S.-China trade tensions, and rising labor costs in East Asia has led to a concerted global push for China+1 sourcing strategies (Apple being a key example). This has opened up a rare and timely window for India to become an alternative destination for sporting goods manufacturing, particularly in the value-to-volume segments like:

- a. Inflatable balls;

- b. Entry- and mid-level fitness equipment;
- c. Gym accessories and team sports gear;
- d. Personal protective equipment (PPE) for sports.

Global brands and buyers are now actively seeking stable, scalable and compliant suppliers outside China; and India, owing to its established clusters (the likes of Meerut, Jalandhar), low-cost labour, English-speaking management talent and trade ties with both Europe and the United States, is ideally positioned to absorb a share of this manufacturing exodus. However, India has not yet capitalized on this shift, largely due to:

- a. Lack of internationally aligned certification systems for manufacturing (e.g., FIFA, ITTF compliance);
- b. Fragmented R&D and design capabilities;
- c. Weak integration between sports federations, manufacturers, and export platforms;
- d. Absence of a centralized digital procurement or registration ecosystem.

Timely government support through a dedicated scheme, certification reforms, cluster development, and export facilitation can help Indian manufacturers seize market share in both premium and volume-based segments that are currently dominated by China, Vietnam and Taiwan.

### **III. *Rationale for Elevating the Sports Goods Manufacturing Sector as a Strategic National Priority***

1. With the sporting goods manufacturing sector now placed under the administrative purview of the MYAS, India stands at a pivotal moment to unlock the sector's long recognized but under-leveraged potential. While the country has historically been a significant manufacturer and exporter of sporting goods, the sector did not previously receive coordinated policy focus aligned directly with national sporting objectives. The present realignment creates an opportunity to integrate manufacturing strength with athlete performance, innovation, and global competitiveness.
2. Sport and sports equipment are interdependent and mutually reinforcing. Sports goods of high caliber, consistent performance, and safety not only guarantee a level playing field with competitors but also serve as critical tools for advancing the standard of sport itself. Aligning equipment manufacturing with athlete-centric needs can significantly elevate sporting outcomes.
3. Strengthening domestic manufacturing will ensure the availability of high-quality sporting goods at significantly lower cost compared to imported equipment, thereby improving affordability for athletes, academies, schools, and federations while reducing dependence on foreign suppliers.
4. The sector has substantial employment potential within labor-intensive MSME clusters, currently supporting over 5 lakh workers across regions such as Meerut and Jalandhar. With targeted policy support, this base can be significantly expanded.

5. India has the opportunity to evolve into a global sourcing hub for elite sports goods, similar to established manufacturing ecosystems in Guangzhou or Dongguan in China, leveraging its skilled workforce, cluster-based production, and growing export footprint.
6. There is strategic importance in providing affordable, high-quality equipment for school, grassroots, and elite athletes, especially as participation expands under national programs.
7. Performance-grade, certified equipment is a non-negotiable requirement for Olympic, Commonwealth, and other international events. A strengthened domestic manufacturing ecosystem becomes a critical enabler of India's global sporting ambitions.
8. The sector aligns naturally with national campaigns such as *Make in India*, *Atmanirbhar Bharat*, and *Digital India*, and supports rural and urban manufacturing equally.
9. Across the world, leading sports brands are not merely commercial manufacturers; they are integral to their nation's sporting identity and performance ecosystems. This demonstrates how manufacturing and sport can operate in synergy:
  - a. **Kookaburra** is an Australian company that manufactures equipment related to cricket, hockey, and football. The company supplies sporting goods internationally (with one of its manufacturing units located in Meerut, Uttar Pradesh). The company has been able to establish a national identity in the Australian sporting ecosystem and is now expanding by introducing a wide range of products and establishing its global presence.
  - b. **Sareen Sports Industries** (brand name: SS or Sunridges) is a popular Indian brand dealing in cricket equipment. The company has been able to establish its identity in the cricketing sphere and is also involved export of cricketing equipment in the UK and Australia.
  - c. **Sanspareils Greenland** (popularly known as SG) is a prominent Indian cricket equipment manufacturer with a massive 850-dealer base worldwide. The brand has almost become synonymous with cricket
  - d. **Apex Sports** is a leading Indian manufacturer of professional snooker and billiards tables. In 2025, it became the first Indian company to supply tables for a World Cup event, installing ten Apex Regalia tables at the Oman World Cup of Men & Team Snooker. This recognition positions Apex alongside global brands such as Xing Pai and Wiraka and strengthens its role in India's cue-sports ecosystem.
  - e. **Head** is an American-Austrian sporting-goods manufacturer producing a wide range of high-performance equipment: tennis, badminton, squash, padel and pickleball racquets, wintersports equipment, sports apparel, shoes, bags, and accessories. The brand pioneered the use of composite and aluminium racket technology and remains a staple in elite sports programmes worldwide. Head gear is extensively used by top-tier athletes in professional tennis and other racket sports, reflecting its strong R&D focus and reputation as a leading performance brand.
  - f. **STIGA Sports** is a Swedish manufacturer of table tennis equipment and recreational sports products. Deeply integrated into Sweden's national table tennis ecosystem, STIGA supplies equipment to clubs,

schools, and national teams. It also collaborates with the Swedish Table Tennis Association and European federations to innovate athlete-ready products. Its consistent presence across grassroots and elite sport gives it strong domestic visibility and identity.

- g. **Butterfly** is a Japanese brand renowned for high-performance table tennis equipment, including rackets, blades, rubbers, and tables. Butterfly is closely aligned with Japan's national training system and is widely used by the country's Olympic and international-level players. The brand is known for its dedicated R&D focus and close collaboration with the Japan Table Tennis Association, making it a staple in Japan's elite sports preparation.
  - h. **Yonex**, also headquartered in Japan, is one of the world's most recognized names in badminton and tennis equipment. While known for its rackets, Yonex is deeply involved in athlete-centric innovation, developing equipment in close partnership with Japan's national badminton program and sports science institutions. Yonex supplies equipment for domestic leagues, Olympic programs, and major tournaments hosted in Japan.
  - i. **Li-Ning** is a Chinese sporting goods company that manufactures a full range of badminton equipment, including racquets, shuttlecocks, bags, and training gear. It is an official supplier to China's national badminton team and has played a critical role in China's dominance in the sport. Li-Ning also supports talent development and national coaching infrastructure, establishing itself as a domestic performance partner.
10. These examples illustrate that globally competitive sporting nations integrate manufacturing, innovation, and athlete development within a coordinated ecosystem. With the sector now under MYAS, India has the institutional foundation to adopt a similar integrated approach and unlock the full potential of its sports manufacturing industry.

#### IV. *Key Policy Suggestions*

1. Now that the sporting goods and sports manufacturing sector has been brought under the administrative purview of the MYAS, there exists a unique and time-sensitive opportunity to reshape this industry through a truly athlete-centric and innovation-led policy framework.
2. It is proposed that MYAS leverage this institutional shift to drive a coordinated national strategy that directly links manufacturing, certification, procurement, R&D and market access with India's sporting performance goals.
3. The following measures are therefore suggested to systematically strengthen domestic production capacities, enhance global competitiveness of Indian manufacturers, expand structured market access, and align manufacturing priorities with national sporting objectives under initiatives such as Khelo India, Fit India Movement, TOPS, and India's long-term Olympic ambitions.
  - a. **Launch of a Dedicated Scheme for Sports Goods**
    - (i) With incentives for investment in R&D, testing infrastructure, smart equipment, and advanced materials.

- (ii) MSME-friendly structure with lower investment thresholds and innovation-linked scoring.
- b. Creation of an Innovation-Driven Ecosystem**
- (i) National database of certified manufacturers and raw material suppliers.
  - (ii) Futuristic design labs and testing facilities in partnership with IITs, NID, and leading federations.
  - (iii) Annual conference to build global visibility and supply chain linkages, like the WAVES Summit 2025.
- c. Retail and Access Infrastructure**
- (i) Decathlon-style multi-brand stores inside stadiums (hub-and-spoke model) to create accessible retail channels for domestic manufacturers.
  - (ii) Encourage Public-Private Partnerships (**PPP**): There is significant scope to harness public-private partnerships for the development of sports manufacturing, retail, and distribution infrastructure. Under this model, private sector partners can contribute capital investment, technical know-how, and operational efficiency, while government bodies such as state sports authorities, municipal corporations and stadium trusts can offer land, infrastructure, policy facilitation and institutional backing. This collaborative approach can accelerate the creation of athlete-centric supply chains and retail ecosystems, while also promoting visibility and commercial viability for Indian sports goods manufacturers.
- d. Strengthening Transport & Supply Chain Infrastructure**
- (i) Sports goods clusters, particularly in Meerut and Jalandhar, continue to face significant logistics and supply-chain bottlenecks. A 2025 industry study indicates that 80% of manufacturers face raw material delays, 40% incur high logistics and warehousing costs, 65% rely on manual systems and over 50% of exporters experience shipment delays due to documentation and compliance complexities<sup>7</sup>.
  - (ii) To address these structural inefficiencies, targeted supply-chain modernization measures are required, including the deployment of automated warehousing, digital vendor-management systems, ERP platforms, and predictive demand analytics.
  - (iii) Additionally, to enhance the logistical issues of the section, cluster-level logistics hubs and streamlined multimodal transport connectivity (road-rail-air) should be developed to ensure timely and cost-effective movement of raw materials and finished goods which is critical for both export competitiveness and domestic large-scale procurement.
- e. Tax-Incentive Framework for Sports-Goods Manufacturing**
- (i) International models, such as Vietnam, demonstrate the effectiveness of targeted fiscal incentives in accelerating sectoral growth. Vietnam offers preferential corporate income tax (CIT) rates of 10% for 15 years and 17% for 10 years, supported by tax holidays and phased

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<sup>7</sup>  
<https://ijrpr.com/uploads/V6ISSUE6/IJRPR48919.pdf#:~:text=Abstract:%20This%20research%20examines%20supply%20chain%20challenges,delay%20by%2040%25%20and%20costs%20by%2015%E2%80%9320%25.>

reductions for priority manufacturing segments. These measures have played a decisive role in attracting long-term capital, scaling MSMEs, and integrating Vietnam into global supply chains.

- (ii) A similar sector-specific tax-incentive framework for sports goods manufacturing in India, linked to high-technology adoption, MSME capacity building, formalization and R&D investments, can significantly boost domestic production of certified, performance-grade sporting goods. Such incentives would encourage reinvestment of profits into innovation and expansion, improve cost competitiveness against global suppliers, and attract patient capital into sports manufacturing as a strategic national industry.

**f. Global Competitiveness Measures**

- (i) Certification system for domestic manufacturers with BIS or ISO-linked licensing.
- (ii) International benchmarking through manufacturing clusters modeled on China and Vietnam.

**V. Sector-Specific Incentive Framework for the Sports Goods Manufacturing Sector**

**1. Context and Rationale for a Dedicated Incentive Architecture**

- a. Over the past few years, the Government of India has deployed performance-linked manufacturing incentives across multiple strategic sectors to stimulate domestic production, enhance value addition, attract investment, and generate employment. These frameworks have been extended to industries such as electronics, pharmaceuticals, automobiles, textiles, and food processing; sectors identified for their export potential, technological intensity, and multiplier effects on supply chains.
- b. The sports goods manufacturing sector shares many of these characteristics: it is export-oriented, labour-intensive, MSME-driven, and capable of significant domestic value addition. However, it has not yet benefitted from a dedicated incentive architecture tailored to its unique intersection of manufacturing, certification, and athlete performance requirements.
- c. With the sector now under the administrative purview of MYAS, there is a timely opportunity to design a sector-specific incentive framework that integrates industrial growth with India's sporting ambitions.

**2. Strategic Case for a Sports Goods-Focused Incentive Framework**

**a. Labor-Intensive and MSME-Led Sector**

The Indian sporting goods industry is inherently labor-intensive, employing over 5,00,000 workers<sup>8</sup>, many of whom belong to semi-skilled or unskilled segments. The sector is also predominantly MSME-driven, with small and medium-scale enterprises forming the backbone of production in clusters such as Meerut (Uttar Pradesh) and Jalandhar (Punjab). Unlike capital-heavy sectors such as semiconductors or automotive, sports goods manufacturing offers a relatively low-capital, high-employment model that is inclusive, regionally balanced, and aligned with rural and Tier II-III employment needs. By

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<sup>8</sup> <https://www.indiantradeportal.in/vs.jsp?lang=2&id=0,31,24100,24120>

incentivizing output-based growth in this sector, the government can achieve both manufacturing targets and social development goals, especially in youth skilling and entrepreneurship.

**b. Export-Ready and Globally Competitive**

India already exports sporting goods to over 150 countries, with annual export figures crossing US\$520 million in FY 2023–24. Products such as inflatable balls, cricket gear, yoga accessories, and gym equipment are already part of global supply chains. However, India's global market share remains below 1%, primarily due to outdated production technologies, limited certification access, and inadequate capital infusion for scaling. A targeted sector specific scheme would allow Indian manufacturers to:

- (i) Invest in modern machinery and automation;
- (ii) Upgrade to federation-grade standards (e.g., FIFA, ITTF);
- (iii) Expand export capacity and participate in global public tenders;
- (iv) Compete effectively with China, Taiwan and Vietnam i.e. countries that currently dominate the mid- to high-volume sports equipment segments<sup>9</sup>.

**c. High Value-Addition Potential**

Unlike sectors that merely assemble imported components, the sporting goods sector in India has the potential for significant in-country value addition. For example:

- (i) Inflatable balls involve local PVC/PU layering, hand-stitching, bladder manufacturing, and packaging.
- (ii) Cricket bats involve seasoning, shaping, binding, branding, and testing, all done domestically.
- (iii) Gym and fitness equipment, if incentivized, can be manufactured with Indian steel and electronics, reducing reliance on Chinese imports.

Incentivizing in-house R&D and design can also push India toward producing smart sports equipment, such as sensor-based wearables, shot-tracking bats, or injury-prevention tools, which sit at the intersection of manufacturing, sport science, and AI.

**d. Alignment with National Sports and Development Goals**

- (i) The Government of India already invests significantly in athlete development through flagship initiatives like the Target Olympic Podium Scheme (TOPS), which supports elite athletes by funding their training, exposure to international competitions, and procurement of specialized equipment. These interventions are aligned with broader national goals to: (i) increase grassroots sports participation; (ii) improve athlete access to training resources; and (iii) boost India's global competitiveness in multi-sport events. However, the sourcing of high-performance equipment under these programs is often fragmented, heavily import-dependent, and cost-intensive, leading to logistical delays and inefficiencies. A coordinated approach between ministries, particularly the MYAS, DPIIT and the Ministry of MSME can help to ensure that this support becomes faster, more cost-effective and locally anchored by building a reliable domestic ecosystem for certified, athlete-grade sporting goods.

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<sup>9</sup> <https://thunderrunners.co.uk/where-is-most-sports-equipment-made-global-hotspots-revealed#:~:text=Most%20sports%20equipment%20manufacturing%20happens,from%20bikes%20to%20badminton%20rackets.>

- (ii) If the aforementioned ministries were to collaborate strategically, much of this equipment could be designed, tested, certified, and manufactured domestically. By aligning the procurement needs of programs like TOPS and Khelo India with a strengthened domestic sports goods manufacturing ecosystem, supported through a dedicated scheme and a MYAS-led certification framework, India can streamline sourcing processes, reduce reliance on imports, lower costs and deliver equipment that is better suited to the specific needs of its athletes.
- (iii) Such inter-ministerial collaboration would not only streamline existing support mechanisms but also align government spending with long-term industrial and sporting policy goals, ensuring that Indian athletes are trained and equipped with world-class, Made-in-India gear, faster and more affordably than ever before.

All of these require high-quality but affordable solutions as sports equipment can help athletes perform better and can also enable the creation of new playing strategies and approaches. By introducing a dedicated scheme for sports goods, the government can ensure that domestic manufacturers are better placed to serve national sports infrastructure, reduce import dependence, and respond quickly to large-scale procurement needs, especially ahead of mega events like the 2030 Commonwealth Games and the 2036 Olympic Games. Moreover, promoting this sector supports *Atmanirbhar Bharat* and *Make in India* initiatives by reducing reliance on Chinese imports, especially in critical equipment categories such as TT tables, javelins, footballs, and athletic apparel.

## VI. Proposed Interventions Beyond a Dedicated Scheme

### 1. *Creation of a National Sports Manufacturing Database*

- a. The proposal is to create a comprehensive, government-managed digital portal which would act as a registry of verified Indian sports goods manufacturers, a centralized reference platform for all interested stakeholders such as NSFs, athletes, educational institutions and exporters.

Key Features to include of the portal:

- (i) **Verified Manufacturer Profiles:** Every entity's listing shall include certifications (e.g., BIS/ISO) that the entity possesses, GST details, manufacturing capacity, cluster location, product catalogue, previous clientele, export credentials, etc.;
- (ii) **Category-Wise Product Indexing:** Manufacturers can be classified based on product type and user level in the manner that Decathlon B2B does, which allows product filtering by user skill level for buyers. The proposed distinction may be as follows:
  - a. **Beginner-level equipment:** Basic, entry-level products designed for new users or casual use.
  - b. **Intermediate equipment:** Higher quality gear suitable for regular users or semi-trained individuals.
  - c. **Advanced/professional gear:** High-performance equipment used in competitive or professional settings.

- (iii) Geo-Tagged Manufacturer Clusters: Users can search by state/region like in the case of India's <https://www.indiamart.com/> or China's <https://www.made-in-china.com/> which bifurcates suppliers based on industrial zones and clusters, facilitating targeted sourcing by buyers.

## 2. *National Certification/Accreditation Framework for Sports Goods Manufacturers*

- a. As India strives to become a global sports manufacturing hub, it must also ensure that its sporting goods meet the highest quality, safety, and performance standards across recreational, national, and international levels.
- b. Currently, the Indian sports goods industry lacks such a universal accreditation framework, and save for limited isolated efforts (such as IS 15844 for sports footwear and some other fragmented particulars for parts of bicycles, etc.), the sector is largely self-regulated. This leaves most products, ranging from cricket balls and boxing gloves, without a globally accepted quality assurance stamp.
- c. Recognizing the absence of a structure, it is proposed for MYAS to create nationally owned certification system for sports goods, which will establish a graded sports goods certification program, consisting of three certificate classes i.e., Foundation, Performance and Excellence which shall each be governed by a separate form and evaluation process. These certifications will be administered by MYAS, but developed in alignment with ISO standards and international federation norms, ensuring that the system is globally credible while remaining locally accessible and administratively integrated with India's procurement and policy environment.
  - (i) Key Features of the MYAS Certification System
    - a. Structured around three certification grades, each with tailored eligibility criteria.
    - b. Application through dedicated MYAS forms, inspired by the Trade Marks Registry model (e.g., Form-TM-A, TM-M, etc.).
    - c. Mandatory certification for participation in government tenders (SAI, NSFs, Khelo India).
  - (ii) Until such time as the MYAS launches a dedicated online portal for the Sports Goods Certification Framework or integrates the same within its existing digital infrastructure, all applications can be submitted through physical means to the designated department at MYAS. The physical application must be submitted in the prescribed format (Form SG/1, SG/2, or SG/3, as applicable), accompanied by the requisite supporting documentation and fees as specified under the framework. All communication during this interim phase may be conducted via physical correspondence or official email as notified by the MYAS. Once the digital portal is operational and formally notified by MYAS, all certification processes must be conducted exclusively through the online system.
  - (iii) Creation of Tiered Certification Grades for Sporting /Goods Equipment

- a. **Grade I** – Foundation Certification: “Domestic-Ready” - Application Form: *Form-SG/1*
- (i) Designed for products intended for grassroots use school programs, fitness-for-all schemes, and recreational training, this grade ensures basic quality and safety.
  - (ii) Certification will require:
    - a. Adherence to ISO 9001 (QMS) practices;
    - b. Use of safe, durable materials (based on lab testing);
    - c. Functional performance (bounce, weight, grip, etc.).
 Examples: Foam balls, plastic bats, cones, jump ropes, school-level yoga mats.
  - (iii) Eligibility Criteria:
    - a. Registered Indian business or MSME;
    - b. Minimum 1-year production history;
    - c. Basic lab testing report from an NABL-accredited facility
  - (iv) Validity: 2 years
  - (v) Fee (proposed): ₹5,000 (with subsidized rates for MSMEs)
- b. **Grade II** – Performance Certification: “Elite-Ready” - Application Form: *Form-SG/2*
- (i) Meant for equipment intended for competition use at state or national level, this certification verifies:
    - a. ISO 9001 and ISO 14001 (environmental standards) compliance;
    - b. Performance specifications endorsed by relevant NSFs (e.g., weight tolerance, pressure retention);
    - c. Mandatory lab testing in ISO 17025-compliant facilities;
    - d. Federation-issued technical clearance note.
 Examples: Federation-grade footballs, match-level cricket bats and balls, boxing gloves, mats, spikes, racquets.
  - (ii) Eligibility Criteria:
    - a. At least 3 years of manufacturing and domestic market presence;
    - b. Full ISO compliance (documented);
    - c. Federation consultation required for product class
  - (iii) Validity: 3 years
  - (iv) Fee (proposed): ₹10,000 (MSME discounted: ₹6,000)
- c. **Grade III** – Excellence Certification: “Export & Olympic-Ready” - Application Form: *Form-SG/3*
- (i) The highest standard, this certification is reserved for manufacturers creating precision equipment for Olympic use, international tournaments, and export to highly regulated markets. Evaluation includes:
    - a. ISO 9001, ISO 14001, and ISO 13485 (for sports medical/sensor gear);
    - b. ISO 17025 (if in-house testing is claimed);
    - c. Compliance with international federation norms (FIFA, ITTF, FIH, IAAF, etc.);
    - d. Third-party verification of technical conformity and testing documentation.

Examples: Smart racquets, Olympic javelins, carbon fibre equipment, AI training devices.

- (ii) Eligibility Criteria:
  - a. 5+ years production history or existing export record;
  - b. International lab testing or validation from global NSFs;
  - c. Mandatory product performance validation under international specifications
- (iii) Validity: 3 years (with annual audit);
- (iv) Fee (proposed): ₹20,000 (MSME discounted: ₹12,000).

(iv) Certification Workflow

a. Physical Submission (Until Portal Launch):

- (i) Applicants will be required to submit a physical application package to the designated MYAS Certification Cell. The package must include the correctly filled application form (Form SG/1, SG/2, or SG/3, depending on the certification grade sought), along with the following supporting documents:
  - a. Copy of manufacturing license or UDYAM/MSME registration;
  - b. Valid ISO certifications (e.g., ISO 9001, ISO 14001, ISO 13485, as applicable);
  - c. Lab test reports from ISO 17025-accredited laboratories;
  - d. Product specification sheets and technical datasheets;
  - e. High-resolution photographs of the products;
  - f. Self-declaration form regarding product compliance and manufacturing standards
- (ii) Upon receipt, MYAS will issue an acknowledgment and application tracking number, and the application will proceed to initial scrutiny and audit scheduling. Once the MYAS Sports Goods Certification Portal is operational, all submissions will transition to the digital platform.

b. Integration with Public Procurement

- (i) All central and state procurement portals for sports equipment will require certification form number and SG-ID provided by MYAS upon registration as a precondition.
- (ii) Procurement filters will allow buyers to select vendors by grade (Foundation, Performance, Excellence).
- (iii) SAI, Khelo India, and NSF-led tenders will publish product-grade eligibility levels (e.g., only SG/2 and SG/3 eligible for National Games gear).

**3. Retail & Distribution Transformation - Decathlon-style Multi-brand Hubs**

- a. The Government can convert stadium spaces into a multi-brand hub, which will provide visibility to Indian brands in the promotion of urban sports. The same can be operated through public-private partnerships, providing exposure to the public to Indian sporting goods brands. The model may be

established in various cities across the country providing access to sporting goods and equipment for all - from the grassroots to the elite level.

- b. Depending on the infrastructure, multi-sport facilities with readily available goods and equipment may be set up in collaboration with universities and multi-sport complexes operating at present across the country. This will lead to faster sales as well as rental models maybe implemented for generating revenue. *Example: The Commonwealth Village in New Delhi provides sporting facilities for most sports and has the existing infrastructure for the establishment of a multi-brand hub. Such an infrastructure can provide the public with access to Indian manufactured sporting goods and equipment while providing these brands the visibility to the general public.*

**4. Capacity Building and Global Positioning - Annual Sports Innovation and Manufacturing Summit (Modelled on WAVES Summit 2025)**

- a. MYAS may organize an Annual Sports Innovation and Manufacturing Summit, modelled on the Government of India’s WAVES Summit 2025, as a flagship convention that brings together key players from across the global sports ecosystem.
- b. This summit will serve as a multi-dimensional platform, combining technology showcases, market linkages, policy roundtables, and investment forums, with the aim of catalyzing India’s growth as a global hub for high-quality, innovation-driven sporting goods.
- c. Key Components of the Summit
  - (i) Tech and Product Exposition;
  - (ii) Live demonstrations of new technologies, prototypes, and certified equipment;
  - (iii) Focused showcases by start-ups and R&D institutes (e.g., IITs, NIDs, SAI centers);
  - (iv) Dedicated “Make in India Sports Hall” featuring certified Indian MSMEs and manufacturers.
  - (v) Global Buyer–Supplier Meet:
    - a. One-on-one business matchmaking between Indian suppliers and international buyers, distributors, and retailers.
    - b. Export readiness training sessions with SGEPC and other stakeholders.
  - (vi) Federation-Led Innovation Labs:
    - a. NSFs presenting briefs on performance challenges, innovation needs, and procurement priorities.
    - b. Interactive sessions between coaches, athletes, and manufacturers for co-designed product development.
  - (vii) Policy & Certification Forum:
    - a. MYAS-led roundtables on public procurement reform, tender digitization and mandatory certification integration.
    - b. International panel on certification regimes and aligning Indian standards.
    - c. Soft launch or revision updates to MYAS’ Graded Certification Portal (SG/1, SG/2, SG/3).
  - (viii) Investor–Startup Exchange:

- a. Pitch sessions for sports start-ups.
- b. Dedicated fund track for seed capital, venture investment and CSR-aligned capital into clusters.
- (ix) Cluster Development Roundtable:
  - a. Joint discussions with state governments on scaling sports manufacturing clusters.
  - b. Showcasing of “Stadium Retail Hubs” and logistics-enablement models (Decathlon-style decentralized fulfilment).
- (x) Athlete & Innovation Talks
  - a. Keynotes by elite athletes and sporting goods manufacturers on product usability and unmet needs.
  - b. Special sessions on para-sports, gender-inclusive design and grassroots adaptations.
- (xi) Strategic Outcomes Expected
  - a. Announcements of public-private R&D collaborations.
  - b. Introduction of new certification-linked procurement norms.
  - c. Launch of cluster-specific export incentive packages.
  - d. Integration of academic institutions into sports product pipelines

The summit is envisioned as a recurring flagship event under MYAS’s manufacturing and innovation vertical, to be held annually on a rotational basis across key sporting and industrial hubs, thereby enhancing regional participation and national visibility. In its inaugural edition, the summit may be strategically aligned with the India International Trade Fair at Pragati Maidan to maximize outreach and stakeholder engagement and thereafter can be aligned with the Khelo India Games.

**5. *Innovation and Manufacturing Excellence - Cluster-Based Manufacturing Hubs (China/Vietnam Model)***

- a. To transform India into a competitive global hub for sporting goods, it is proposed to develop large-scale, integrated manufacturing clusters that offer plug-and-play infrastructure for both established companies and MSMEs. These clusters would be designed to reduce entry barriers for manufacturers by providing ready-built factory units, shared utilities, and common infrastructure, thus minimizing capital expenditure and facilitating rapid operationalization.
- b. Each hub would be integrated with key support systems such as:
  - (i) In-house logistics centers with access to road, rail, and air connectivity;
  - (ii) Product testing and certification labs aligned with MYAS/ISO standards;
  - (iii) Compliance cells for export documentation and international quality audits;
  - (iv) Skill development and training facilities in partnership with NSDC, ITIs, and local universities.
- c. The design and operational model of these hubs would be inspired by successful international examples, such as Dongguan and Guangzhou in China and Da Nang in Vietnam, where tightly integrated manufacturing ecosystems have enabled scale, cost-efficiency, and rapid innovation. These

hubs have helped position their respective countries as dominant players in the global sporting goods and light engineering markets.

- d. India's proposed clusters can be developed in existing sports manufacturing regions such as Meerut and Jalandhar and further expanded to new regions with industrial potential such as Gujarat, Tamil Nadu, Maharashtra and Telangana through targeted land allocation, infrastructure investment and state-level incentives.
- e. A well-planned transportation network integrating modern logistics systems, including automated warehousing, digital ERP platforms, streamlined export processes, and multimodal transport connectivity between these hubs will ensure efficient movement of raw materials and finished goods, further enhancing the competitiveness and operational readiness of the clusters.
- f. Each manufacturing cluster should be supported by a dedicated, integrated logistics and transport corridor, including access to container freight stations (CFS), inland depots and port-linked express freight routes, to enable time-bound exports and seamless domestic distribution.
- g. A cluster-linked tax incentive framework could also be introduced, offering benefits such as reduced corporate tax rates, GST-linked input prioritisation and accelerated depreciation on plant, machinery, and testing infrastructure for manufacturers operating within these approved sports manufacturing hubs.
- h. Such hubs would also enable deep backward linkages with domestic raw material producers and forward linkages with certified retail/distribution networks, thereby completing the ecosystem from factory to market.

#### **6. *Futuristic Product Design and Innovation Labs***

- a. To transform India into a global center for sports equipment innovation, it is proposed that MYAS establish a network of Futuristic Product Design and Innovation Labs, in collaboration with Indian Institutes of Technology (IITs), National Institute of Design (NIDs), and other premier engineering and sports science institutions. These labs could be co-funded by MYAS and participating institutions or private partners, operating under a public-private-academic partnership model.
- b. Core Focus Areas:
  - (i) Smart Equipment and innovation.
  - (ii) Development of sensor-embedded cricket bats, smart racquets, footballs with GPS tracking, and AI-integrated training gear.
  - (iii) Focus on technologies enabling motion capture, fatigue detection, technique analysis and performance tracking.
  - (iv) Using biomechanics labs to study athlete movement and integrate findings into product design.

- c. Materials Science and Ergonomics
  - (i) Research on lightweight composites, biodegradable materials, impact-resistant polymers, and energy-absorbing foams.
  - (ii) Designing gear that enhances performance while reducing injury risks, particularly for youth and para-athletes.
- d. Sustainability and Circular Design
  - (i) Promoting recyclable, modular, and repairable product models to reduce lifecycle environmental impact.
  - (ii) Research into eco-friendly coatings, waterless dyeing, and packaging innovation.
- e. Key Functional Features of the Labs
  - (i) Rapid Prototyping Units: 3D printing, laser cutting, and moulding systems to quickly translate ideas into testable equipment.
  - (ii) Athlete Feedback Loops: Dedicated testing zones within each lab, linked to SAI or NSF training facilities, where athletes can trial prototypes and provide structured feedback.
  - (iii) Design Sprint Modules: Short-cycle R&D challenges where startups and students work with federations to address specific sporting needs (e.g., a new mat for wrestling, or paddle shape for table tennis).
  - (iv) Data Integration: Cloud-based dashboards for sharing test results, material analysis, and injury-prevention analytics with manufacturers and coaches.
- f. Operational Model and Scaling:
  - (i) Labs would be established in phases, starting with 3–4 anchor institutions (e.g., IIT Kanpur, NID Ahmedabad, IIT Madras, IIT Gandhinagar etc) that already have sports tech, materials science, or biomechanics strengths.
  - (ii) MYAS could contribute core funding, while institutions offer land/labs, and private sporting goods companies co-invest through CSR or venture capital.
  - (iii) A National Governing Council, comprising representatives from MYAS, DPIIT, NITI Aayog, NSFs, and appropriate academia, will define annual innovation agendas and approve joint research projects.

## VII. Implementation Roadmap

The implementation roadmap outlined herein is aimed at translating the proposed policy interventions such as the launch of a dedicated scheme, certification systems, procurement reforms and infrastructure development into a phased and actionable plan. By dividing the initiative into short, mid and long-term priorities, the proposed roadmap offers a structured approach for the MYAS to mobilize resources, build institutional capacity and create an enabling ecosystem for India's sporting goods sector to achieve scale, innovation, and global competitiveness.

a. **Short-Term (0–12 months)**

*Focus: Scheme Notification, Frameworks, Institutional Setup*

- (i) Notification & Governance Setup
  - a. Finalize and notify the scheme for Sports Goods.
  - b. Constitute a PMA and Certification Cell under MYAS.
  - c. Issue inter-ministerial orders outlining role-sharing between MYAS and DPIIT.
- (ii) Certification Rollout
  - a. Launch manual application process for MYAS Certification (SG/1, SG/2, SG/3).
  - b. Release Guidelines for Certification.
- (iii) Database & Portal Development: Start development of:
  - a. National Sports Manufacturing Database
  - b. MYAS Sports Certification Portal
- (iv) Pilot Procurement Reform
  - a. Issue an advisory to SAI and selected NSFs to include MYAS grades in tenders.
  - b. Identify and pre-certify 50–100 manufacturers as procurement-ready.
- (v) Summit & Stakeholder Engagement
  - a. Organize the first Annual Sports Manufacturing & Innovation Summit.
  - b. Run outreach campaigns for manufacturers, NSFs and state governments.

b. **Mid-Term (1–3 years)**

*Focus: Scale-Up, Infrastructure, Ecosystem Integration*

- (i) Scheme Operationalization
  - a. Accept applications and disburse first-year incentives.
  - b. Evaluate and adjust incentive slabs/thresholds based on uptake.
- (ii) Certification Portal Go-Live
  - a. Digitize all certification processes and issue first batch of digital licenses.
- (iii) Product Design & Innovation Labs
  - a. Establish 3–4 co-funded futuristic labs with IITs, NIDs, or SAI.
  - b. Begin R&D projects in smart equipment, eco-materials, etc.
- (iv) Stadium Retail Hubs Pilot
  - a. Launch pilot Decathlon-style multi-brand hubs in 2–3 major stadiums (e.g., Siri Fort, Noida Stadium, Commonwealth Village Delhi).
  - b. Create operating framework for PPP-managed retail models.

c. **Long-Term (3–5+ years)**

*Focus: Global Market Leadership, Sustainability, Export Growth*

- (i) Mature Certification Ecosystem
  - a. Mandate MYAS certification across all central/state-funded procurement programs.
  - b. Pursue international recognition of MYAS standards (e.g., FIFA, BWF, ITTF alignment).
- (ii) Global Brand Positioning
  - a. Partner with SGEPC to host India Sporting Goods Expo in key foreign markets.

- b. Support creation of globally competitive Indian brands for Olympic gear and smart sports tech.
- c. Ensure India supplies certified gear to mega-events (e.g., Commonwealth 2030, Olympics 2036).

## VIII. International Models

### a. China

- (i) In order to implement the decision of the Chinese Government to enhance financial services for the sports industry, support its high-quality development, and further stimulate sports consumption, the People's Bank of China (PBOC), the General Administration of Sport (GAS), the National Financial Regulatory Administration, and the China Securities Regulatory Commission on April 11, 2025, released the "Guiding Opinions on Financial Support for the High-Quality Development of the Sports Industry" (**Guidelines**)<sup>10</sup>. The Guidelines, *inter alia*, called for increasing financial supply in sectors such as sports equipment manufacturing and sports services, leveraging the financial sector to stimulate growth in sports consumption.
- (ii) The Guidelines proposed 16 specific measures in three aspects: (i) intensifying financial support for the development of key areas in the sports sector; (ii) elevating the specialization level of financial services tailored to the sports sector; and (iii) reinforcing organizational implementation safeguards.
- (iii) The 16 specific measures included strengthening financial support for sports infrastructure building, increasing financial supply for sports goods manufacturing and the sports services industry, leveraging the role of finance to boost sports consumption, promoting financial support for the development of professional sports, enhancing the quality and efficiency of financial services for sports events, improving insurance coverage to support the sports industry, financial leasing services to drive the development of the sports industry and raising the public's awareness and understanding of policies, in addition to other financial support.
- (iv) With respect to the demands from sports goods manufacturers for financial services and to transform and upgrade sports goods manufacturing, the Guidelines proposed establishing a multi-tiered and comprehensive financial support for MSMEs, guaranteed loans for start-ups, and for the cultivation of 'gazelle companies' and 'hidden champions'.

### b. Vietnam

- (i) The Vietnamese government provides incentives in specific sectors and areas from foreign enterprises - including sports<sup>11</sup>. Under the government encouraged incentives on foreign investment, enterprises can be eligible for three forms of incentives - preferential Corporate Income Tax (CIT), import duties/tax and land rent and levies.
- (ii) CIT incentives are one of the most attractive features of the Vietnamese business landscape and tend to be one of the most important among investment incentives to foreign investors. CIT

<sup>10</sup> <http://www.pbc.gov.cn/en/3688110/3688172/5552468/5677656/index.html>

<sup>11</sup> <https://www.vietnam-briefing.com/doing-business-guide/vietnam/taxation-and-accounting/tax-incentives-for-businesses>

incentives are granted to both foreign and local investors, with preferential tax rates and tax exemption forming the two types of CIT incentives granted to enterprises.

- (iii) Vietnam has encouraged the establishment of economic zones throughout the country. These zones provide increased access to infrastructure, pools of talent, and networks of suppliers. Foreign investors in these zones also benefit from tax incentives extended by the Vietnamese government. Most economic zones qualify an investor for tax holiday incentives. In limited cases, where the zone is located in a disadvantaged area, a preferential rate of corporate income tax will also apply. Foreign investors must set up their operations inside of a zone that offers incentives in order to qualify for preferential treatment or tax holidays.
- (iv) Certain sectors in Vietnam are encouraged by the government for investment, including industries that the government plans to incentivize, prioritize, or which are beneficial to society - including sports. Preferential CIT rates and further exemptions are provided to enterprises operating in educational training, vocational training, health care, culture, sports, and environmental industries. These enterprises can be eligible to CIT exemption for up to 4 years and 50% CIT reduction for up to 9 subsequent years.

c. *Taiwan*

- (i) Taiwan's sporting goods have been regarded as one of the important and traditional export-oriented industries. Sporting goods manufacturers have built up a thriving industry in Taiwan as production revenues have risen from around US\$1.29 billion in 2012 to US\$2.97 billion in 2021. According to the Ministry of Economic Affairs' (MOEA) Department of Statistics, fitness and home gym equipment and golf gear account for over 70 percent of production. More than 90 percent of locally made sporting products are sold overseas<sup>12</sup>.
- (ii) Taiwan has a Taiwan Sporting Goods Manufacturers Association (TSMA), established by 16 Taiwanese sports racket manufacturers in 1972, which mainly acts as a platform between the local sports industry and the government<sup>13</sup>. TSMA works to expand Taiwan companies' international presence. Its major tasks are to promote export of Taiwan-made sporting goods, to participate in international sporting goods fairs with Taiwan-made quality image, to review overseas investment projects, to achieve governmental resources for industrial R&D and market expansion, and to facilitate government policies on intellectual property, on prevention of design piracy as well as on trademark counterfeiting as well as on environmental protection. The association comprises most of the 400 plus manufacturers in eight categories of fitness; golf; indoor sports; outdoor sports and sportswear; sports balls and nets; rackets; water sports; and winter sports.
- (iii) In 2024, the Sports Administration under the Ministry of Education was instructed to begin preparations for establishing the Ministry of Sports<sup>14</sup>. To build a high-quality sports industry environment and promote the development of the sports industry, the Taiwan Sports Industry Development Center (Center)<sup>15</sup> will be established under the Ministry of Sports. The Center

<sup>12</sup> <https://taiwantoday.tw/Economics/Top-News/222756/Full-speed-ahead-for-Taiwan%E2%80%99s-sporting-goods-industries>

<sup>13</sup> <https://profile.clustercollaboration.eu/profile/cluster-organisation/4a5a9c3a-6515-4961-bca1-2b161466f552>

<sup>14</sup> <https://focustaiwan.tw/society/202505150026>

<sup>15</sup> <https://edu.law.moe.gov.tw/EngLawContent.aspx?lan=E&id=20477&KW=>

will be a non-departmental public body and will function under the supervision of the Ministry of Sports. The scope of operation of the Center, inter alia, will be to provide guidance, consultation, and assistance in the operation, investment, and financing of the sports industry, planning, establishment, governance, and utilization of assets in the sports industry, value enhancement and market expansion of sports products or services, and the implementation and management of business models.

- (iv) The Center is required to seek approvals from the Ministry, receive governmental financial support in addition to public and private donations, take recommendations for the appointment and dismissal of personnel, etc.