2022-2023

China Ski Industry White Book

By

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English Version Provided

By

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Preface

The Haze has Dissipated, and the Future has Come

Unknowingly, in the blink of an eye, it comes the day when the eighth report, the *2022-2023 White Book on China's Ski Industry* be released. The wheels of the years run forward with their inherent pace and rhythm as if unwilling to stop and reminisce about the scenery they have passed.

As everyone is looking forward to the first snow season after the Beijing Winter Olympics, the curtain call of the COVID-19 epidemic unexpectedly brought a serious impact on this snow season. No matter how many fiery hearts want to fly in the snow field, we have to accept the fact that the first past-Olympics dividend was ruthlessly killed by the epidemic. December 2022 and January 2023 can be said to be the most difficult period experienced by the domestic ski resort industry: The ski resorts are operating at full capacity, while the vast majority of people are either experiencing the torment of being infected with the virus or staying behind closed doors worrying about being infected.

Thankfully, though, we all made it through. What is even more fortunate is that the difficulties faced by the industry together have calmed us down and made us more united. When the river rushes by, the waves will take away the sand and leave real gold. I believe from the bottom of the heart that the suppression of enthusiasm will only be temporary, and the perseverance of skiers will bloom with stronger power.

Sincere thanks to all colleagues in the industry who have supported the research for a long time and all the ski resort staff for their hard work. Heartfelt thanks go to the following teams who participated in the research of this book: Snowpal, Zhongxue Zhongyuan, BMHRI, POMA, Zhongsuo Guoyou, SnowElan, TECHNOALPIN, SMI, DOWAY, Nortec, Lebingxue, GEE COOL, Shuohuaji, GOLDEN SNOWFLAKE, Yuanhe Partners and other related teams.

I would also like to deliver my sincere gratitude to the ISPO team and Mr Laurent Vanat of Switzerland for providing the below official publishing platform for the White Book. Special thanks go to my old friend, Pro. Yuxuan Chen, partner of Beijing Yuanhe Partners, for their diligent and professional work in preparing the English version of this White Book.

http://www.ispo.com/   *http://vanat.ch/publications.shtml*

The last but not least, I want to say to everyone who loves skiing, including myself, that there may still be setbacks and difficulties in the future, but after the test of the epidemic in the past three years, we have sufficient reason to believe that as long as we have confidence and the courage to never give up, we can create a bright future after the Winter Olympics together!

Wu Bin (Benny Wu)

August 4, 2023

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Chapter I. Ski Resorts and Skier Visits

Ski resorts and skier visits are the two pillars of the entire ski industry, around which all the businesses and activities of the ski industry are established and evaluated. Therefore, the number of ski resorts and skier visits constitute the two essential indicators of the ski industry. This report will mainly be focused on the research about outdoor ski resorts and indoor ski resorts rather than simulation ski resorts. In addition, this report uses the ‘snow season fiscal year’ as the annual report cycle, that is, from May 1 each year to April 30 of the following year.

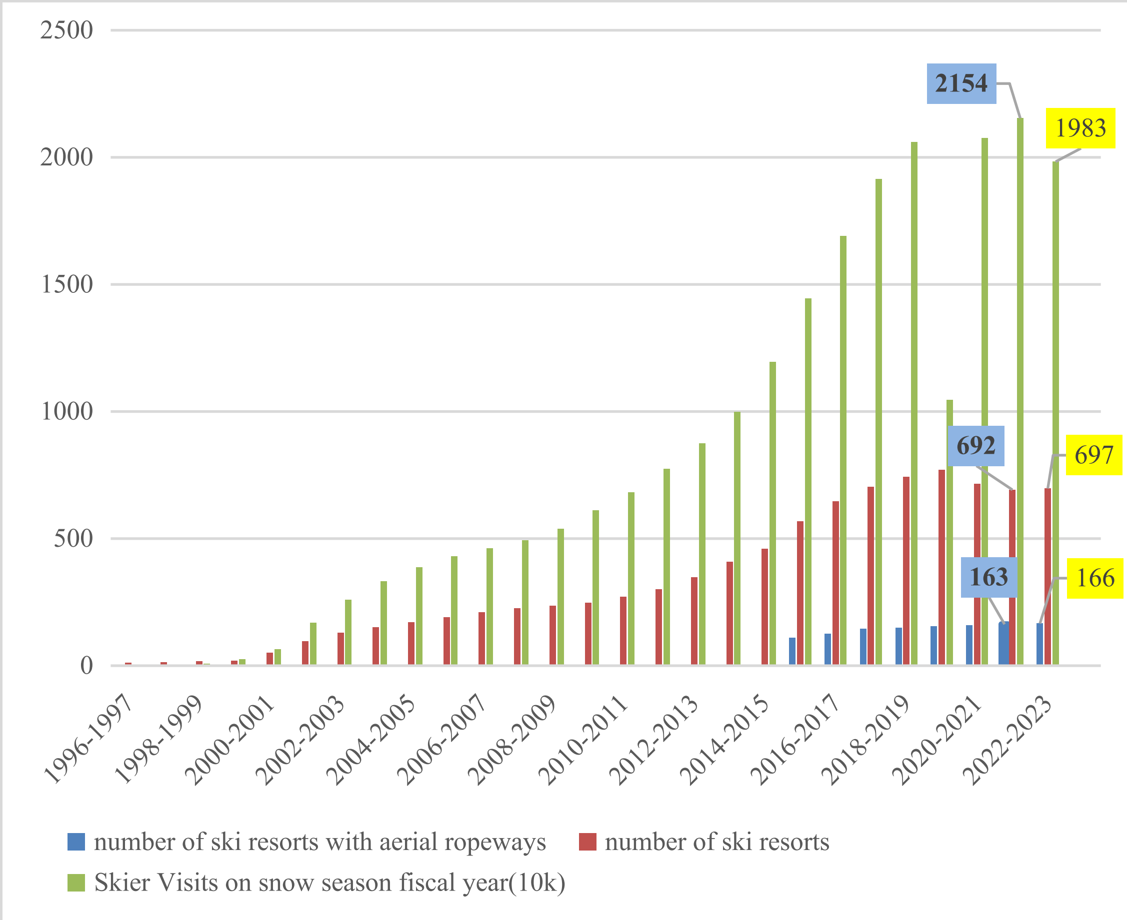
I. Number of Ski Resorts, Skier Visits, and Skiers

During the fiscal year of the 2022-2023 snow season, thirteen resorts were newly built and put into operation in China, including eight indoor ski resorts and five outdoor ski resorts. The number of ski resorts that were not open to the public due to the epidemic or other reasons was eight. The total number of ski resorts that are actually open to the public is 697. As of April 30, 2023, there are 166 ski resorts with aerial ropeways that are open nationwide.

From May 1, 2022, to April 30, 2023, the number of skier visits in domestic ski resorts was 19.83 million, a year-on-year decrease of 7.94% compared with 21.54 million in the previous year. The trend of the number of ski resorts and the number of visits is shown in Figure 1-1.

In December 2022, the prevention and control policy of the COVID-19 epidemic nationwide was fully liberalized, which led to a surge in the number of concentrated infections among urban populations, and the remaining people chose to stay at home to avoid infection. Therefore, in December 2022 and January 2023, the visits of most ski resorts declined severely.

According to the model calculation of the number of skiers in the White Book, during the 2022-2023 snow season fiscal year, the number of people who participated in skiing was 11.18 million, with a decrease of 7.03% compared with 12.02 million in the previous year. In the 2022-2023 snow season fiscal year, the per capita skiing times of skiers in domestic ski resorts dropped from 1.79 in the previous year to 1.77.



Note: 'ski resorts in total' and 'skier visits' in this figure only take data of outdoor ski resorts and indoor ski resorts into account. The data of dry slopes and ski simulators are excluded.

Figure 1-1: Statistics on Ski Resorts & Skier Visits in China (by 2022-2023 fiscal year)

II. Distribution of Ski Resorts and Skier Visits

In the past two years, the *National Sports Venue Statistical Survey Data* continuously released by the State General Sports Administration shows that as of December 31, 2021, the number of ski resorts in the country is 811, and as of December 31, 2022, the number of ski resorts in the country is 876. At the same time, the sports administrations of most provinces have successively released detailed data on sports venues in their provinces. These official data have been of great help to the White Book research. Table 1-1 counts the detailed information on the distribution of 697 domestic ski resorts in operation by province and compares them with the official data, so that readers can fully understand the overall distribution of ski resorts.

Rank	Province	Ski Resorts Counted in the White Book (2022-2023)	Ski Resorts as Officially Counted (2022)	Ski Resorts Counted in the White Book (2021-2022)	Ski Resorts as Officially Counted (2021)
1	Heilongjiang	78		79	74
2	Xinjiang	64	56	65	52
3	Hebei	63		63	118
4	Shandong	60	70	61	65
5	Shanxi	49	45	49	45
6	Jilin	41	55	41	53
7	Henan	41		43	34
8	Inner Mongolia	39	48	39	43
9	Liaoning	34	59	34	57
10	Shaanxi	29		29	29
11	Zhejiang	23	18	20	16
12	Gansu	23		23	22
13	Jiangsu	22	26	21	21
14	Hubei	20	19	19	
16	Sichuan	15		13	27
15	Beijing	14	33	14	35
17	Chongqing	14		14	15
18	Ningxia	13	13	13	
19	Tianjin	11		11	18
20	Hunan	9		9	6
21	Guizhou	9	8	8	8
22	Qinghai	8	10	8	10
23	Yunnan	4		4	4
24	Guangdong	3	12	2	6
25	Anhui	3	5	3	5
26	Guangxi	3		3	3
27	Jiangxi	2	3	2	3
28	Fujian	2	1	1	0
29	Shanghai	1	8	1	10
30	Hainan	0	1	0	1
	In Total	**697**	**876**	**692**	**811**

Note: After comparison, it is found that the statistics of ski resorts announced by some provincial administrations include indoor ski simulator venues (such as: Shanghai) or play snow parks.

Table 1-1: The Distribution of Ski Resorts in China (by province)

In the 2022/2023 snow season fiscal year, the number of skier visits ranked in the top ten by province (TOP 10) is shown in Table 1-2.

Rank	Rank in Last Year	Province	YoY+%	2022-2023	2021-2022
1	3	Hebei	36.15%	254	187
2	2	Jilin	-6.67%	203	218
3	1	Beijing	-25.31%	180	241
4	4	Xinjiang	-17.63%	137	167
5	7	Zhejiang	15.81%	125	108
6	5	Sichuan	-4.26%	119	124
7	6	Heilongjiang	-9.74%	104	115
8	8	Shanxi	-19.75%	84	105
9	9	Shandong	-19.73%	83	103
10	10	Guangdong	-13.25%	72	83

Table 1-2: Skiers Visits Ranked TOP10 by Province (unit: 10,000 people)

As can be seen from the above table, compared with the previous year, the top ten provinces in the number of skiers have not changed, but the rankings have changed. Hebei rose from the third place to the first place, Beijing dropped from the first place to the third place, Jilin kept second place, and Zhejiang rose from the seventh place to the fifth place.

Judging from the year-on-year increase in the number of skiers, among the top ten provinces, only Hebei and Zhejiang have a year-on-year increase in the number of skiers, while other provinces experienced a significant decline.

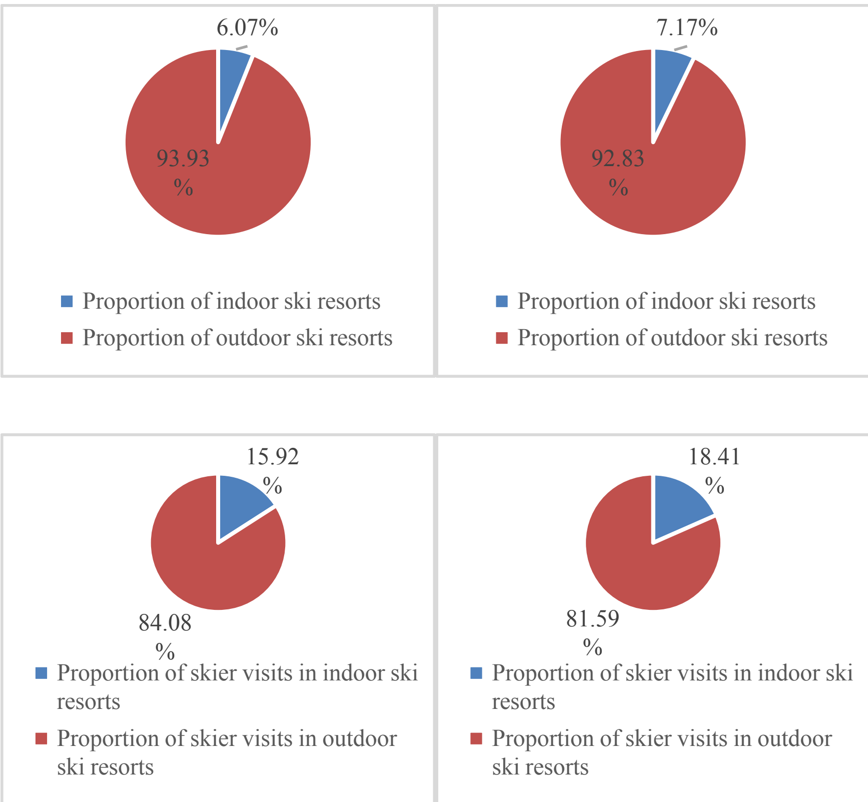
Obviously, the market reaction to the fluctuations and material changes of the epidemic prevention and control policy has caused a serious imbalance in the ski market, and the visit flow in most provinces has declined significantly.

Chapter II. Classified Information Statistics of Ski Resorts

In order to have a clearer insight into the characteristics of domestic ski resorts, this report studies the classified information statistics of ski resorts from six different dimensions, namely, indoor and outdoor, core target customer groups, vertical drop, slop area, number of aerial ropeways, and number of skier visits.

I. Statistics by Indoor and Outdoor Classification

From 2022 to 2023, there were eight newly added indoor ski resorts, and so far, the number of indoor ski resorts opened in China has reached 50, accounting for 7.17% of all 697 ski resorts in operation. The 50 indoor ski resorts brought out a total of 3.65 million skier visits, an increase of 6.47% compared with the previous year's 3.43 million skier visits, accounting for 18.41% of the total 19.83 million skier visits.



2021-2022 **2022-2023**

Figure 2-1: Proportion of Indoor/Outdoor Ski Resorts and Skier Visits

The indoor ski resort business has exploded in China, which is the most noteworthy phenomenon in the domestic ski industry in recent years. Figure 2-2 shows that since 2013, the number of indoor ski resorts that have been put into operation over the years has basically shown a linear upward trend.

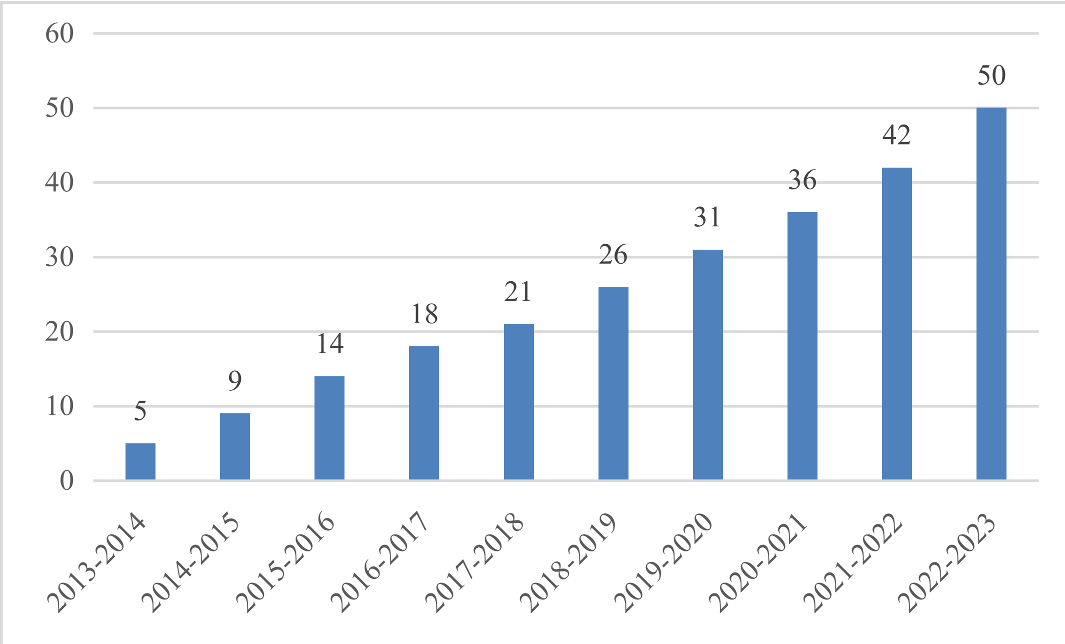


Figure 2-2: Statistics on the Number of Indoor Ski Resorts in Operation in China

The statistics of the number of indoor ski resorts and the year-on-year growth of skier visits are shown in Table 2-1. New venues and epidemic fluctuations are still the two main factors affecting the number of indoor skier visits. The impact of the epidemic has led to the intermittent closure of indoor ski resorts in some areas, resulting in serious discontinuities in operation. The data during this period cannot reflect the real situation of the market.

	2022-2023	2021-2022	YoY+%
Number of Indoor Ski Resorts	50	42	19.05%
Indoor Skier Visits（10,000)	365	343	6.41%
Number of All kinds of Ski Resorts	697	692	0.72%
Total Skier Visits（10,000)	1983	2154	-7.94%
The proportion of Indoor Ski Resorts	7.17%	6.07%	18.18%
Proportion of Indoor Skier Visits	18.41%	15.92%	15.62%

Table 2-1: Statistics on the Number of Skier Visits in the Indoor Ski Resorts

From the perspective of the development of global indoor ski resorts, as mentioned in the previous White Book, China is far ahead of other countries and has become the well-deserved number one in the world. It can be seen from Table 2-2 that China has already accounted for half of the top ten indoor ski resorts in the world ranked by the size of the snow area. At the same time, the top three indoor ski resorts in terms of snow area are all in China.

Rank	Indoor Ski Resort Name	Country	Snow Area (square meters)
1	**Harbin Sunac Snow World**	China	65,000
2	**Guangzhou Sunac Snow World**	China	55,700
3	**Chengdu Sunac Snow World**	China	55,000
4	**SnowWorld Landgraaf**	Netherland	35,000
5	**Alpincenter Hamburg – Wittenburg**	Germany	30,000
5	**Snowy area of Changsha Xiangjiang Happy City**	China	30,000
7	**Ski Dubai**	UAE	27,870
8	**SNORAS Snow Arena**	Lithuania	25,000
9	**Xanadu**	Spain	24,000
10	**Kunming Sunac Snow World**	China	22,000

Table 2-2: Global Ranking of Indoor Ski Resorts by Snow Area (Top 10)

It can be seen that from the perspective of the number and scale of indoor ski resorts, China has become the world's largest indoor ski powerhouse. In addition, according to incomplete statistics, there are currently more than 10 domestic indoor ski resort projects under construction, of which at least 4 new projects will enter the global TOP 10.

II. Statistics by Core Target Customer Group Classification

Generally, from the perspective of the core target customer groups, domestic ski resorts are divided into three categories: tourism experience type, suburban learning type, and destination vacation type.

Type of Ski resort	Quantity Percentage		Target Group	Attributes	Resort Feature	Characteristics of Visitors
	2022-2023	2021-2022				
Tourism Experience Resorts	76.90%	77.60%	Sightseer	Touristic	Basic facilities, equipped with only beginner trails. Located in tourist attractions or suburban area.	Over 90% are one-time-only visitors, with an average stay of 2 hours.
Suburban Learning Resorts	19.23%	18.79%	Local Resident	Sports Touristic	The mountain has a small vertical drop and is located on the outskirts of the city, with beginner, intermediate, and advanced ski trails developed.	Local self-driving guests account for a large proportion, with an average stay time of 3-4 hours
Destination Vacation Resorts	3.8%	3.61%	Crowd on Vacation	Vacation Sports Touristic	The mountain has a certain scale. In addition to a complete range of ski products, there are also supporting facilities such as accommodation.	Overnight spending accounts for a relatively large amount, and the average stay time of guests is more than 1 day.

Table 2-3: Classification of Ski Resorts by Core Target Customer Groups in China

In the fiscal year of the 2022-2023 snow season, there are 27 ski resorts have the characteristics of destination resort-type ski resorts, bringing out 4.32 million skier visits in total, accounting for 21.79% of the total skier visits; 134 ski resorts have the characteristics of suburban learning ski resorts, brought out 9.01 million skier visits in total, accounting for43.46% of the total skier visits; 536 ski resorts belong to the tourism experience type, with a total of 6.4 million skier visits, accounting for 32.76% of the total skier visits.

It can be seen from Figure 2-3, destination ski resorts have shown a certain upward trend, while tourist experience ski resorts have shown a downward trend.

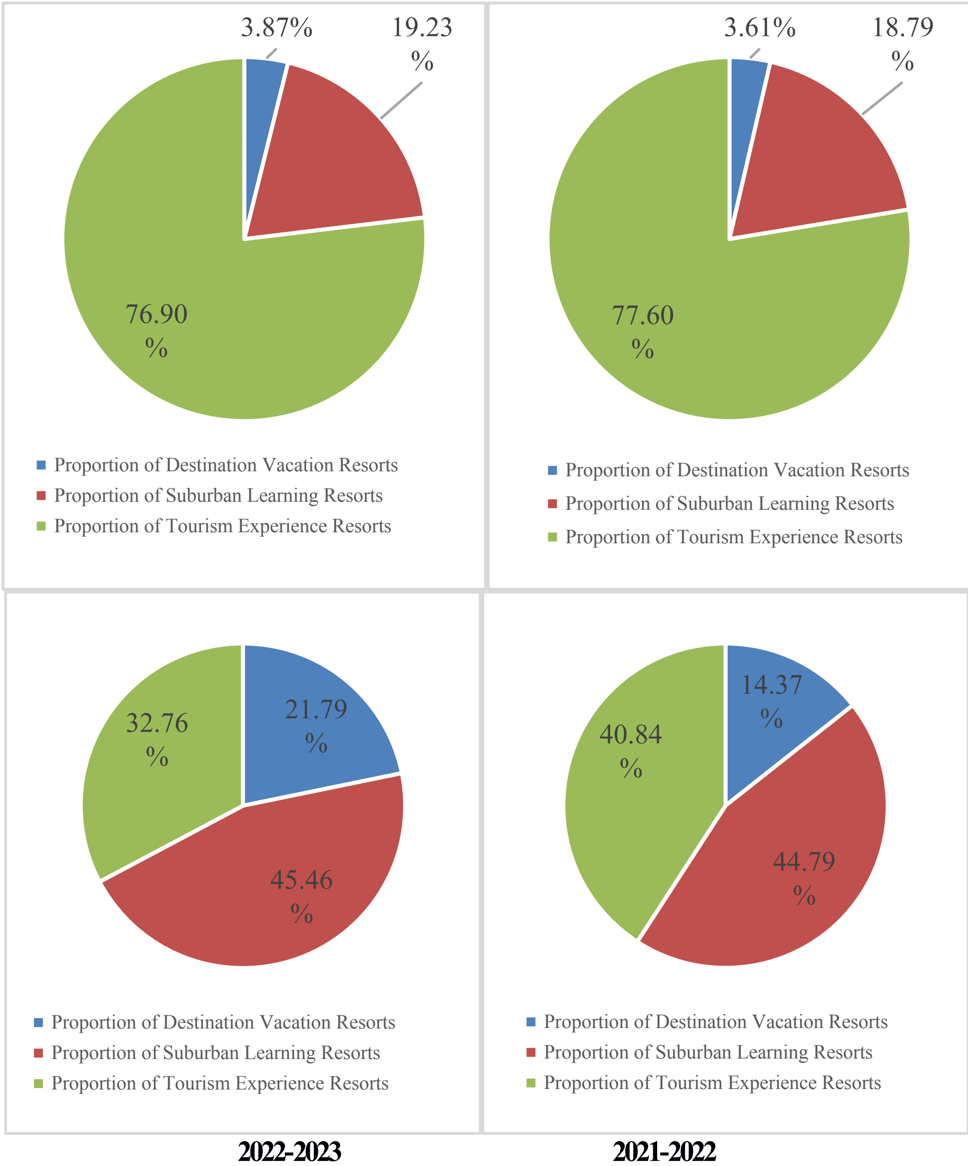
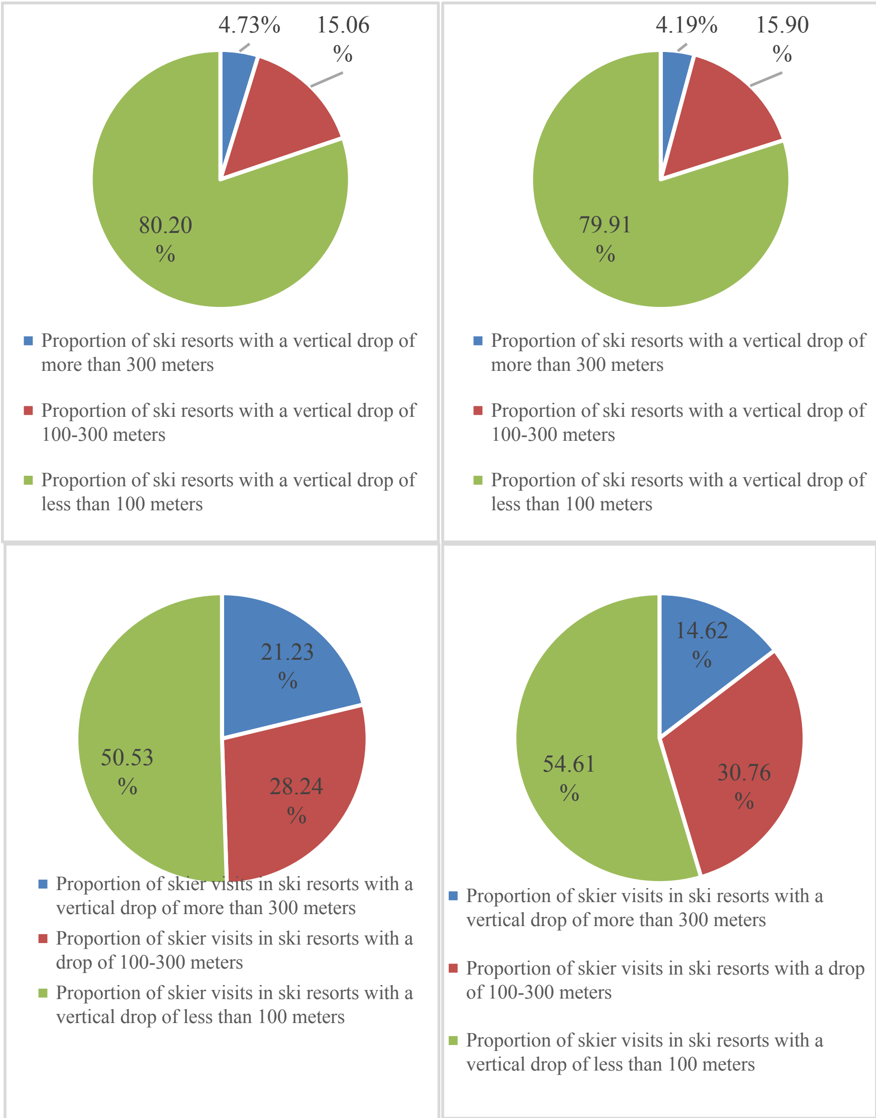


Figure 2-3: Proportion of Ski Resorts and Skier Visits by Target Customer Groups

III. Statistics by Vertical Drop Classification

The vertical drop of the ski resort is a key figure to measure the resource scale of the ski resort in the mountains. From the perspective of the vertical drop of the actual development of ski slopes, we count domestic ski resorts under the following three categories: 33 ski resorts with a vertical drop of more than 300 meters, accounting for 4.73%, and 21.23% of the number of skiers; 105 ski resorts with a vertical drop between 100 and 300 meters, accounting for 15.06%; 559 ski resorts with a vertical drop of fewer than 100 meters, accounting for 80.20%. The proportion of ski resorts classified by vertical drop is shown in Figure 2-4.



2022-2023 **2021-2022**

Figure 2-4: Proportion of Ski Resorts in China by Vertical Drop

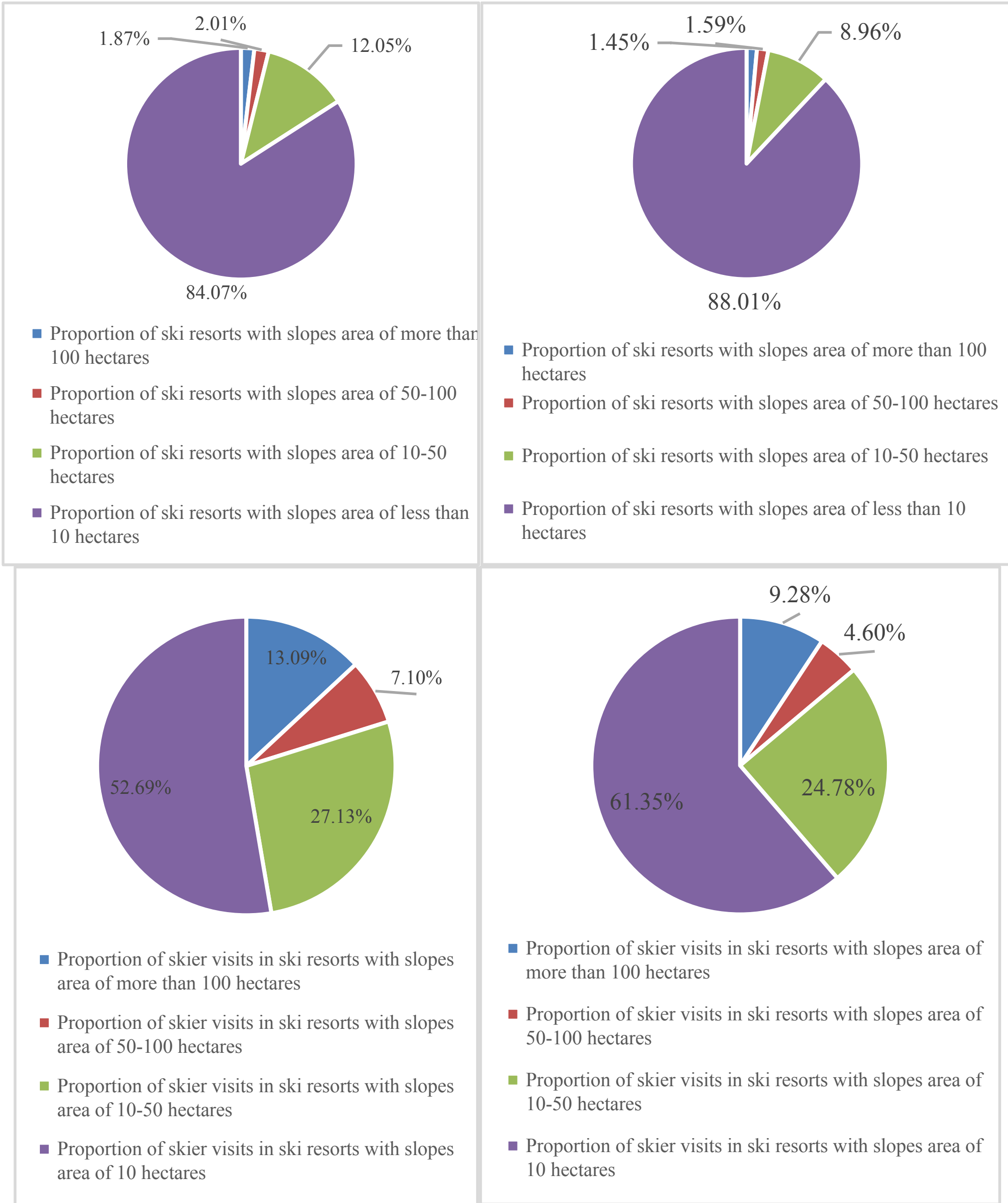
IV. Statistics by Slopes Area Classification

The slopes area is another important indicator to measure the size of the ski resort. According to incomplete statistics, the total slopes area of all operating ski resorts in China is about 6,300 hectares. The distribution and ranking of the slopes area by province are shown in Table 2-4.

Rank	Province	2022-2023 Slopes Area (Hectare)	2022-2023 Number of Ski Resorts	Average Slopes of Ski Resorts (Hectare)
1	Xinjiang	1615	64	25.23
2	Jilin	907	41	22.12
3	Hebei	771	63	12.24
4	Inner Mongolia	338	39	8.67
5	Heilongjiang	312	78	4.00
6	Shanxi	277	49	5.65
7	Liaoning	266	34	7.82
8	Beijing	260	14	18.57
9	Shandong	207	60	3.45
10	Shaanxi	192	29	6.62
11	Henan	189	41	4.61
12	Hubei	171	20	8.55
13	Sichuan	152	15	10.13
14	Gansu	135	23	5.87
15	Zhejiang	115	23	5.00
16	Ningxia	72	13	5.54
17	Chongqing	59	14	4.21
18	Jiangsu	54	22	2.45
19	Tianjin	48	11	4.36
20	Guizhou	48	9	5.33
21	Hunan	25	9	2.78
22	Qinghai	24	8	3.00
23	Yunnan	17	4	4.25
24	Anhui	17	3	5.67
25	Jiangxi	15	2	7.50
26	Guangdong	8	3	2.67
27	Fujian	8	2	4.00
28	Guangxi	6	3	2.00
29	Shanghai	1	1	1.00
In Total		6309	697	9.05

Table 2-4: Ranking of China's ski Resorts by Slopes Area (province)

From the classification statistics in Figure 2-5, the number of ski resorts with a sloped area of more than 100 hectares only accounts for 1.87% of the total ski resorts, but the number of skier visits generated therefrom accounts for 13.09% of the total skier visits.



2022-2023 **2021 2022**

Figure 2-5: Proportion of Ski Resorts and Skier Visits by The Slopes Area

V. Statistics by Aerial Ropeway Classification

Whether there is an aerial ropeway in the ski resort is the most intuitive impression and standard when evaluating domestic ski resorts. As of April 30, 2023, the number of ski resorts with aerial ropeways in China was 166, an increase of three compared to the previous year. Among them, there are 34 ski resorts with detachable ropeway, an increase of four compared to the previous year. Table 2-5 summarizes the relevant information on ski resorts with aerial ropeways.

	Number of Ski Resorts (2022-2023)	Skier Visits 2022-2023 (10K)	Skier Visits 2021-2022(10K)
≥ 4	15	316	238
≥ 2	58	743	647
≥ 1	166	1140	1136
With detachable ropeway	34	475	370
In total	**697**	**1983**	**2154**
Proportion of resort with ≥ 4 aerial ropeways	2.15%	15.95%	11.05%
Proportion of resort with ≥ 2 aerial ropeways	8.32%	37.47%	30.04%
Proportion of resort with ≥ 1 aerial ropeways	23.82%	57.49%	52.74%
Proportion of resort with detachable ropeway	4.88%	23.95%	17.18%

Table 2-5: Statistics on Ski Resorts with Aerial Ropeways

It can be seen from the figure in the table that the number of ski resorts with aerial ropeways accounts for 23.82%, but the proportion of skier visits has exceeded 57%. In addition, there are 15 ski resorts with more than four aerial ropeways, accounting for only 2015%, and skier visits accounting for more than 15%.

At the same time, the detachable ropeway has obviously been recognized by the market. In addition to those pursued the newly built large-scale ski resorts, many old middle-scale ski resorts also choose to invest in detachable ropeways when renovating and expanding. In the fiscal year of the 2022-2023 snow season, the number of ski resorts with detachable ropeways has reached 34, accumulatively generating 4.75 million skier visits, accounting for 23.95% of the total skier visits.

VI. Statistics by Skier Visits Classification

Just as Mr. Laurent, who is from Switzerland, has always focused on ski resorts with more than one million skier visits in his *Global Ski Market Report* over the years, it will of more and more increasingly practical significance to classify and screen ski resorts with skier visits as a key indicator.

In 2022-2023 snow season fiscal year, the number of ski resorts with more than 100,000 skier visits in the whole year is 42, which is a slight decline from 46 in the previous year.

Along with the decline in the overall number of skier visits, the number of skier visits in resorts with more than 100,000 skier visits also declined year-on-year, but their proportion in the total number of skier visits rose slightly, reaching 46.62%.

	Number of Ski Resorts 2022-2023	**Number of Ski Resorts 2021-2022**	**Skier Visits 2022-2023 (10K)**	**Skier Visits 2021-2022(10K)**
Skier Visits ≥ 100,000	42	46	925	972
In Total	**697**	**692**	**1983**	**2154**
Proportion of Skier Visits/Ski Resorts with ≥ 100,000 Visits	6.65%	5.31%	45.13%	42.05%

Table 2-6：Statistics on Ski Resorts with More than 100,000 Skier Visits (2022-2023)

Chapter III. Equipment & Facilities of Ski Resorts

I. Lifting Facilities for Ski Resorts: Aerial Ropeway & Magic Carpets

Lifting facilities fundamentally determine the operational efficiency of ski resorts and are the most important part of any ski resort. At present, aerial ropeways and magic carpets are the main lifting facilities in domestic ski resorts. Frequently asked questions such as 'Does the ski resort have aerial ropeways?' or 'How many aerial ropeways are there?' show that it is an important KPI indicator to evaluate the scale and efficiency of the ski resort.

1. Aerial Ropeway

In the 2022-2023 snow season fiscal year, there are a total of 24 aerial ropeways newly built and put into operation in China, distributed in Beijing, Xinjiang, Hebei, Jilin, Shanxi, Sichuan, Heilongjiang and Inner Mongolia.

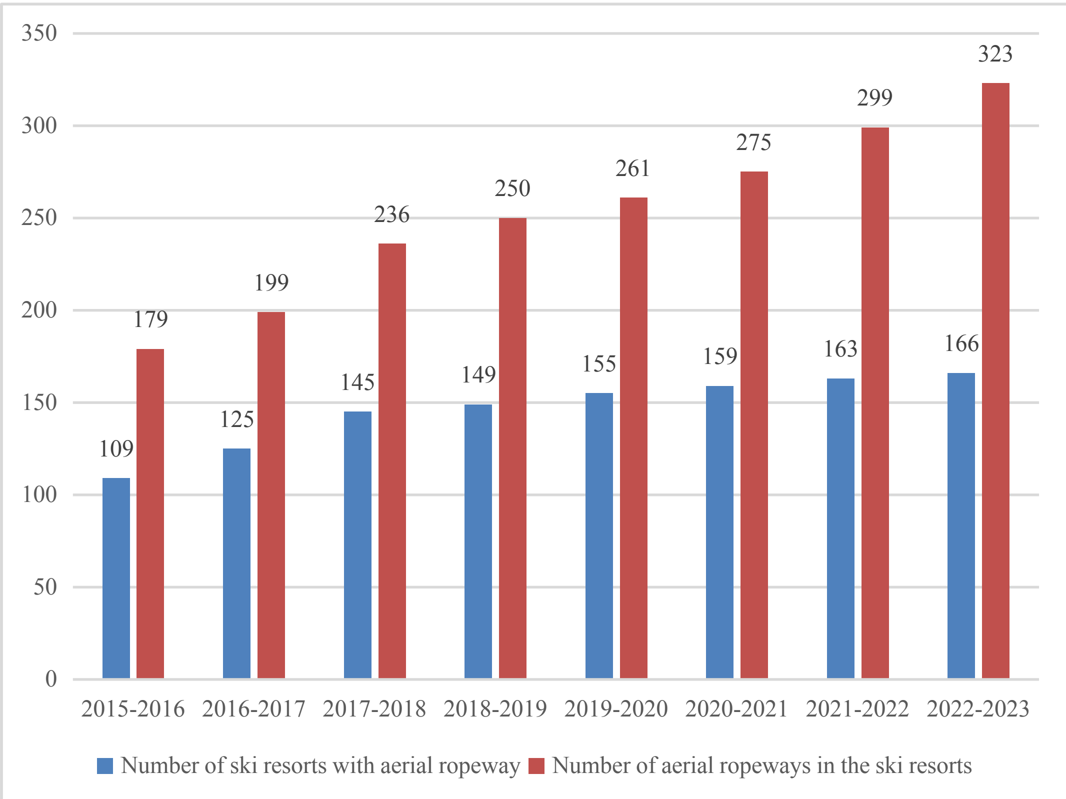


Figure 3-1: Statistics on the Numbers of Ski Resorts with Aerial Ropeways & Aerial Ropeways

As of April 30, 2023, the total number of aerial ropeways built and put into use in domestic ski resorts is 323, distributed in 166 ski resorts in 21 provinces across the country. Among them, Hebei, Jilin, and Heilongjiang ranked top three with 61, 49, and 41, respectively. Xinjiang has become the focus of the country due to the addition of 11 ski aerial ropeways this year, and the total number has reached 38, ranking fourth in the country. The detailed number and distribution of aerial ropeways are shown in Table 3-1.

Rank	Province	Aerial Ropeways 2022-2023	Newly Built Aerial Ropeways 2022-2023	Aerial Ropeways 2021-2022	Ski Resorts with Aerial Ropeways
1	**Hebei**	61	4	57	24
2	**Jilin**	49	3	46	18
3	**Heilongjiang**	41		41	27
4	**Xinjiang**	38	11	27	13
5	**Beijing**	30		30	11
6	**Liaoning**	28		28	19
7	**Inner Mongolia**	19	1	18	11
8	**Shanxi**	12	3	9	7
9	**Gansu**	8		8	7
10	**Shaanxi**	7	1	6	5
11	**Shandong**	6		6	6
12	**Sichuan**	5		5	3
13	**Henan**	4	1	3	2
14	**Yunnan**	3		3	1
15	**Chongqing**	3		3	3
16	**Hubei**	3		3	3
17	**Guizhou**	2		2	2
18	**Tianjin**	1		1	1
19	**Guangdong**	1		1	1
20	**Ningxia**	1		1	1
21	**Hunan**	1		1	1
	In Total	**323**	**24**	**299**	**166**

Table 3-1: Distribution of Aerial Ropeways in Ski Resorts

In ski resorts with aerial ropeways, the number of detachable aerial ropeways is particularly the representation of the scale and efficiency of the ski resort. Among the 24 newly built ski aerial ropeways in 2022-2023, 18 are detachable. So far, the number of detachable aerial ropeways nationwide has increased to 101, and the number of ski resorts with detachable ropeways has increased to 34.

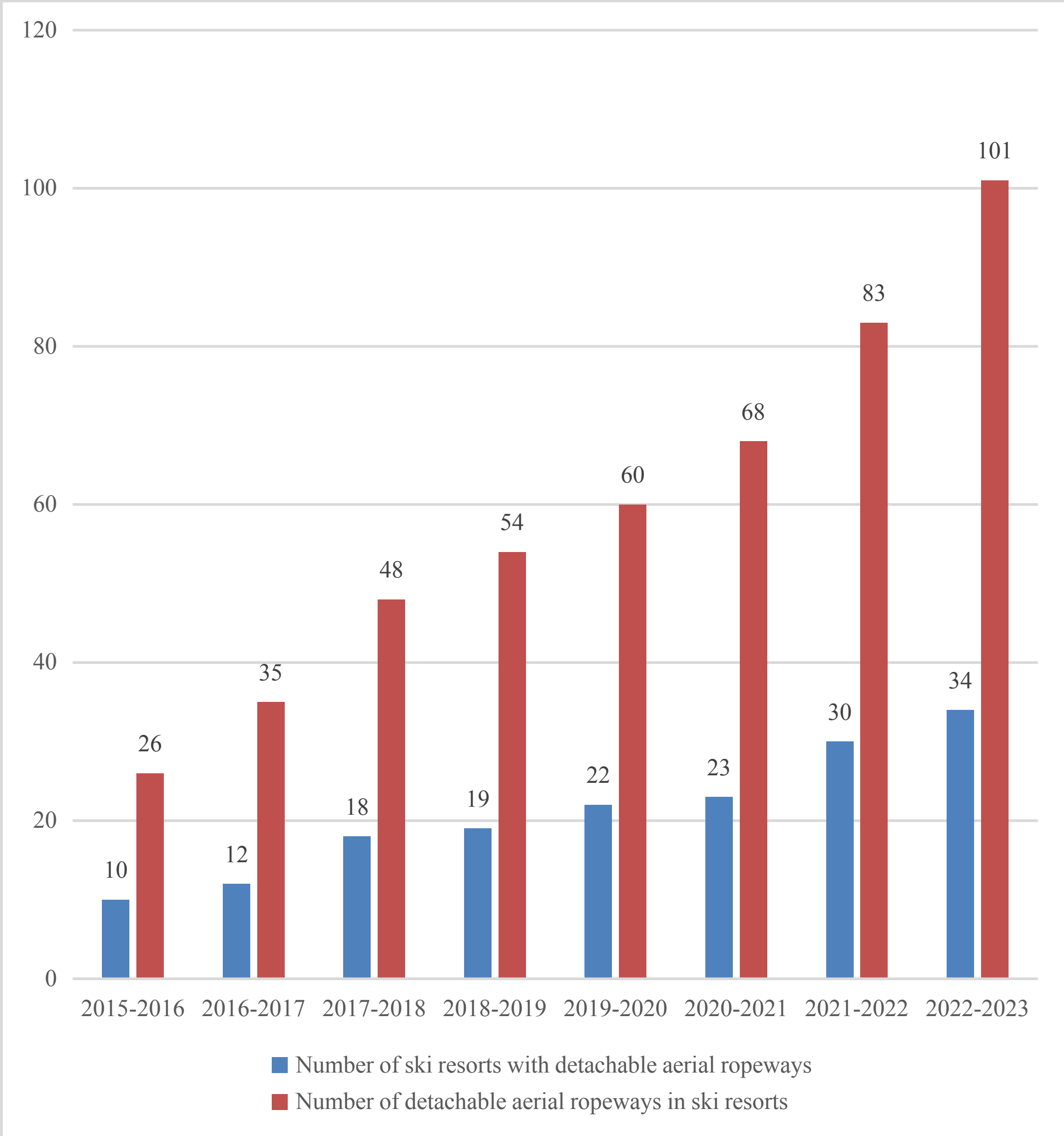


Figure 3-2: Statistics on the Detachable Aerial Ropeways in Ski Resorts in China

Figure 3-3 shows the relationship between imported and domestically manufactured detachable aerial ropeways since 2015. The development of domestic detachable aerial ropeways is quite rapid, and as of April 30, 2023, the number of domestically manufactured detachable ropeways put into operation in domestic ski resorts has increased from 2 in 2015 to 51, surpassing imported ropeways for the first time. This year, 18 newly added detachable aerial ropeways in domestic ski resorts are all made in China.

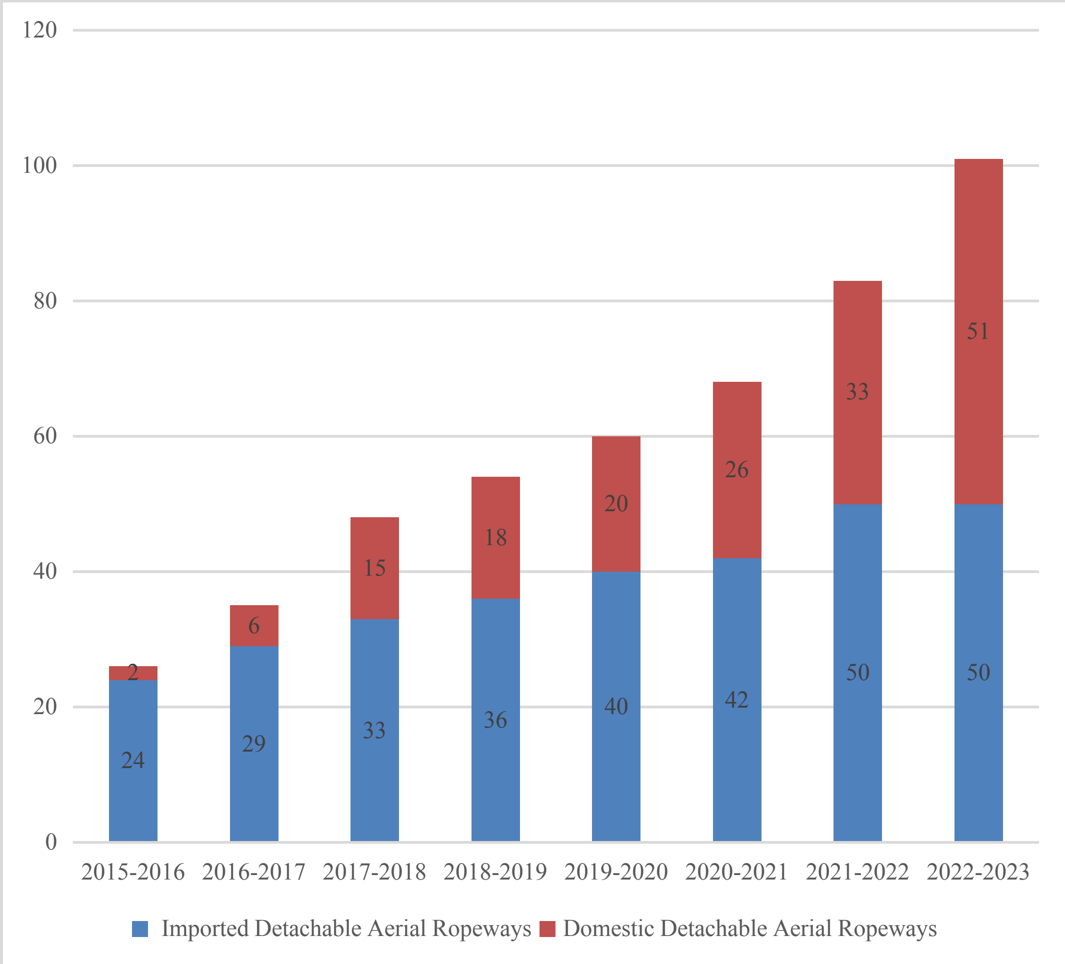


Figure 3-3: Statistics on the Imported and Domestically Manufactured Detachable Aerial Ropeways

Table 3-2 and Table 3-3 provide detailed statistics on the number and ranking of detachable aerial ropeways in domestic ski resorts in various ski resorts and provinces. (Note: This statistic only includes ropeways used for skiing, and those not used for skiing are excluded.)

Number	Rank	Ski Resort	Detachable Aerial Ropeways 2022-2023	Detachable Aerial Ropeways 2021-2022	Detachable Aerial Ropeways 2020-2021	Province
1	1	Qiaoshan Beidahu	8	6	5	Jilin
2	2	National Alpine Ski Center (Yanqing Xiaohaituo)	7	7	5	Beijing
3	3	Vanke Songhua Lake	6	6	6	Jilin
4	3	Wanlong	6	6	6	Hebei
5	5	Wanda Changbaishan	5	5	5	Jilin

6	**5**	**Taiwoo**	5	5	5	**Hebei**
7	**5**	**Koktokay**	5	3	3	**Xinjiang**
8	**5**	**Hemu Jikepulin**	5	2		**Xinjiang**
9	**9**	**Genting**	4	4	4	**Hebei**
10	**9**	**Fulong**	4	4	4	**Hebei**
11	**9**	**Yabuli (sport commission)**	4	4	4	**Heilongjiang**
12	**9**	**Wanfeng (Tonghua)**	4	4		**Jilin**
13	**9**	**Jiangjunshan**	4	2	2	**Xinjiang**
14	**9**	**Silkroad**	4	3	2	**Xinjiang**
15	**15**	**Taibai Aoshan**	3	2	2	**Shaanxi**
16	**15**	**Jinshanling**	3	2		**Hebei**
17	**17**	**Luneng Changbaishan**	3	2	2	**Jilin**
18	**17**	**Cuiyunshan Galaxy**	2	2	2	**Hebei**
19	**17**	**Yabuli (Sunlight)**	2	2	2	**Heilongjiang**
20	**17**	**Liangcheng Daihai**	2	2	2	**Inner Mongolia**
21	**17**	**Mazongshan**	2	1		**Inner Mongolia**
22	**17**	**Sayram Lake**	2			**Xinjiang**
23	**23**	**Miaoxiang Mountain**	1	1	1	**Jilin**
24	**23**	**Duole Meidi**	1	1	1	**Hebei**
25	**23**	**Maoer Mountain**	1	1	1	**Heilongjiang**
26	**23**	**Changchun Lianhuashan**	1	1	1	**Jilin**
27	**23**	**Meilingu**	1	1	1	**Inner Mongolia**
28	**23**	**Lvcongpo**	1	1	**1**	**Hubei**
29	**23**	**Huaibei**	1	1		**Beijing**
30	**23**	**Xianfeng**	1	1		**Jilin**
31	**23**	**Qishan**	1	1		**Hebei**
32	**23**	**Funiushan**	1			**Henan**
33	**23**	**Guangwu**	1			**Shanxi**
34	**23**	**Qinggeli Wolf Mountain**	1			**Xinjiang**
		In Total	**101**	**83**	**68**	

Table 3-2: The Ranking of Ski Resorts by the Number of Detachable Aerial Ropeways

Province	Ski Resorts with Detachable Aerial Ropeways 2022-2023	Detachable Aerial Ropeways 2022-2023	Detachable Aerial Ropeways 2021-2022
Jilin	8	28	26
Hebei	8	26	25
Xinjiang	6	21	10
Beijing	2	8	8
Heilongjiang	3	7	7
Inner Mongolia	3	5	4
Shaanxi	1	3	2
Hubei	1	1	1
Henan	1	1	
Shanxi	1	1	
In Total	**34**	**101**	**83**

Table 3-3: The Ranking of Provinces by the Number of Detachable Aerial Ropeways

Jilin, Hebei, and Xinjiang ranked in the top three with 28, 26, and 21 detachable ropeways respectively.

2. Magic Carpets in Ski Resorts

With the widespread usage of magic carpets in ski resorts, many domestic scenic spots have also begun to use magic carpets as a transmission device for tourists. Because the equipment manufacturers did not strictly classify the orders from various customers, so it is difficult to count the accurate number of magic carpets in the ski resorts. According to incomplete statistics, in the fiscal year of the 2022-2023 snow season, there are 120 magic carpets newly put into use in the ski resort, with a cumulative length of about 19,000 meters, slightly higher than the previous year.

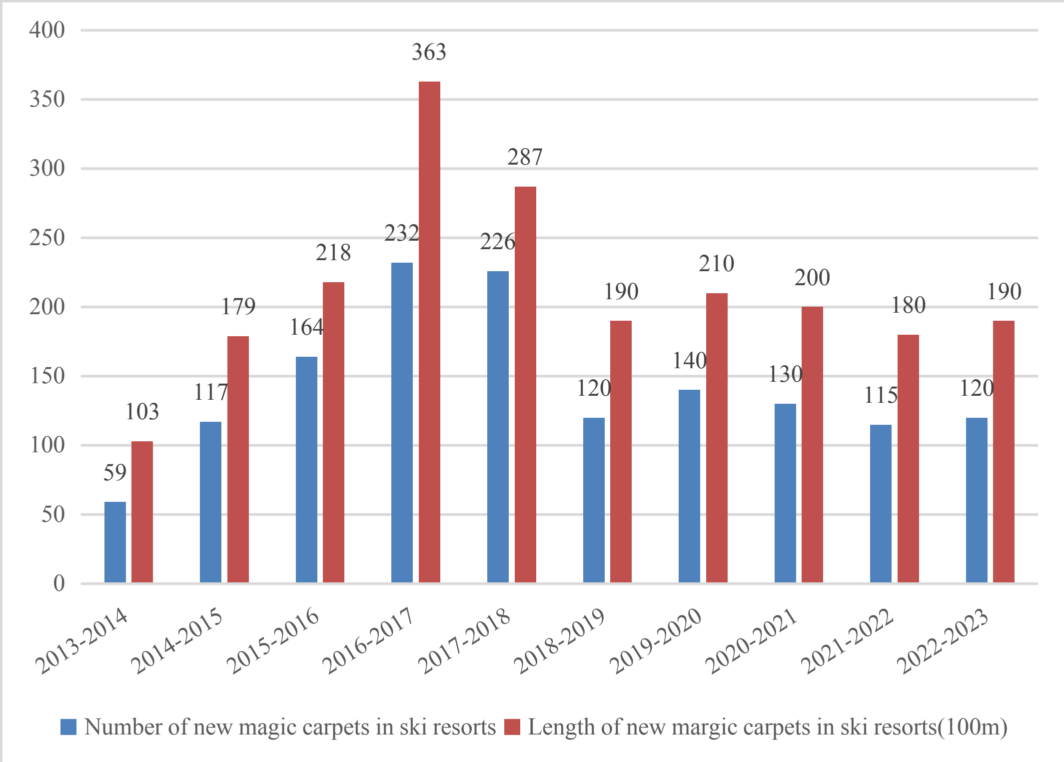


Figure 3-4: The Number & Length of New Magic Carpets in Ski Resorts

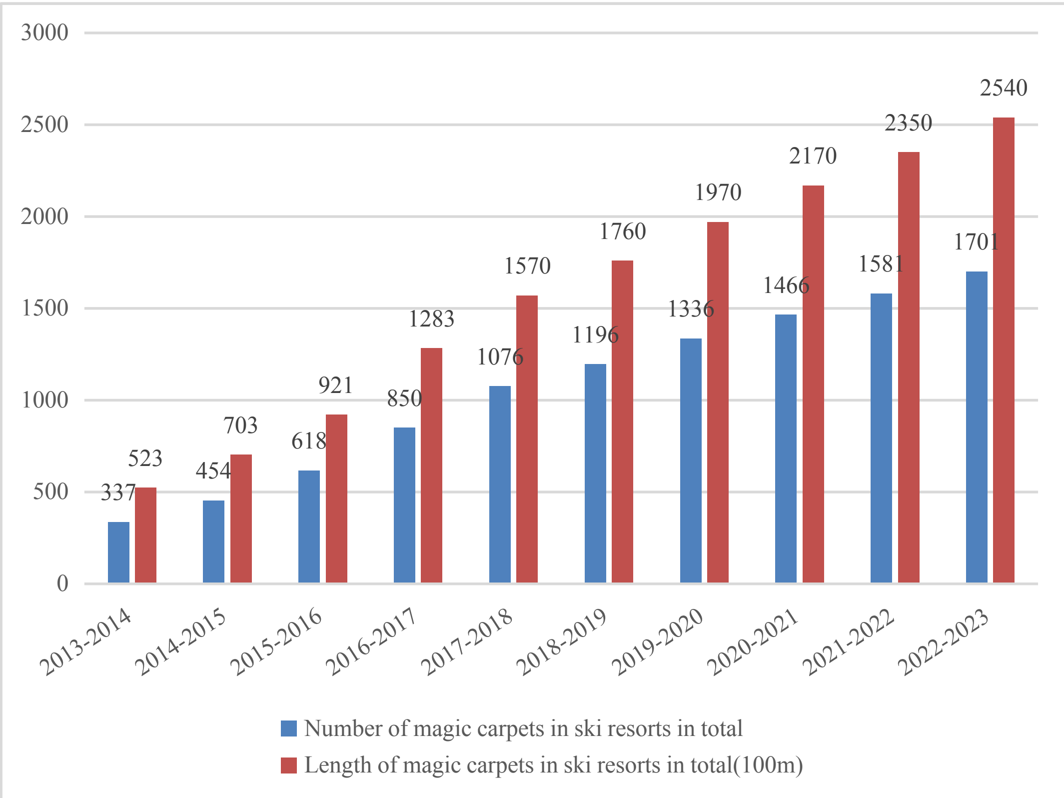


Figure 3-5: The Number & Length of Magic Carpets in Total

The data of magic carpets comes from major domestic magic carpet suppliers. As of April 30, 2023, a total of 1,701 magic carpets in domestic ski resorts are in operation, and the total length of all magic carpets is about 254 kilometers.

II. Ski Resort Field Facilities: Snow Groomer & Snowmaker

Judging from the actual sales performance of major snow groomer and snowmaker suppliers, although the epidemic has affected the construction of some ski resort projects to a certain extent, the number of the overall ski resort facilities is still growing.

1. Groomer

According to the data provided by several major snow groomer suppliers, in the 2022-2023 snow season fiscal year, the number of new domestic pressurized snow trucks is 75. Among them, 30 are imported new vehicles, five are domestically produced, and 30 are newly imported second-hand snow groomers which are leased to serve the venues of the Beijing Winter Olympics. Up to now, there are about 800 snow groomers in domestic ski resorts. It should be appreciated that this report does not include domestic modified snow groomers.

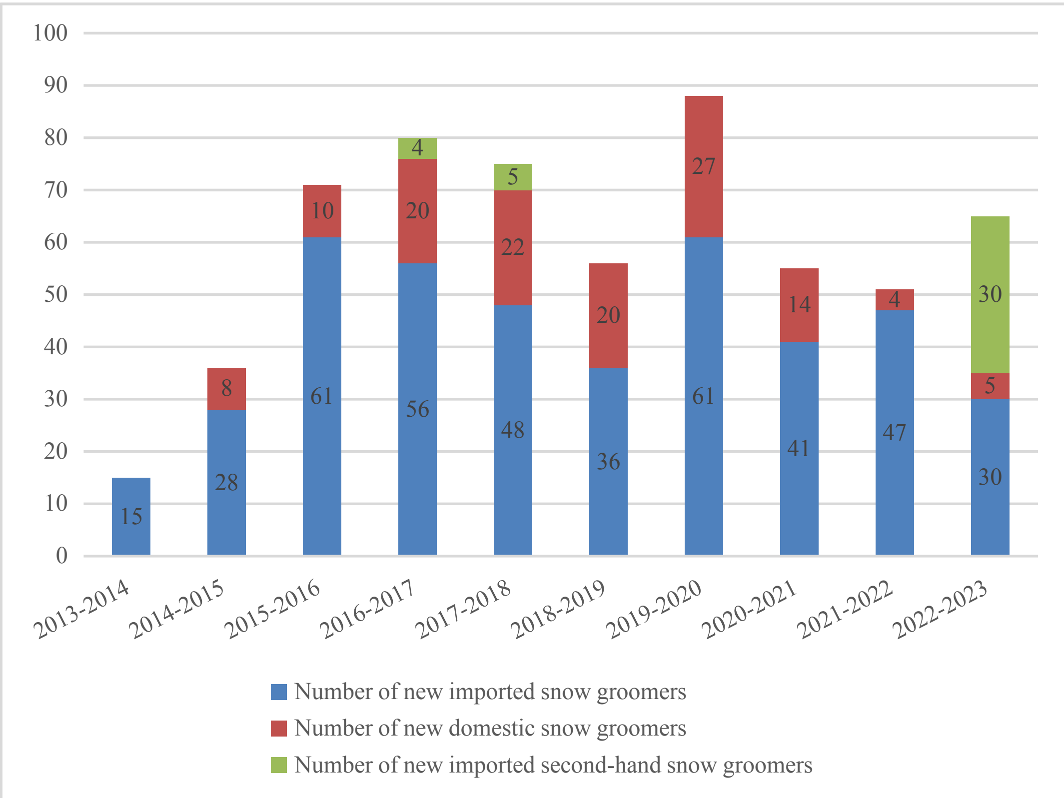


Figure 3-6: New Groomers in Ski Resorts in China

2. Snowmaker

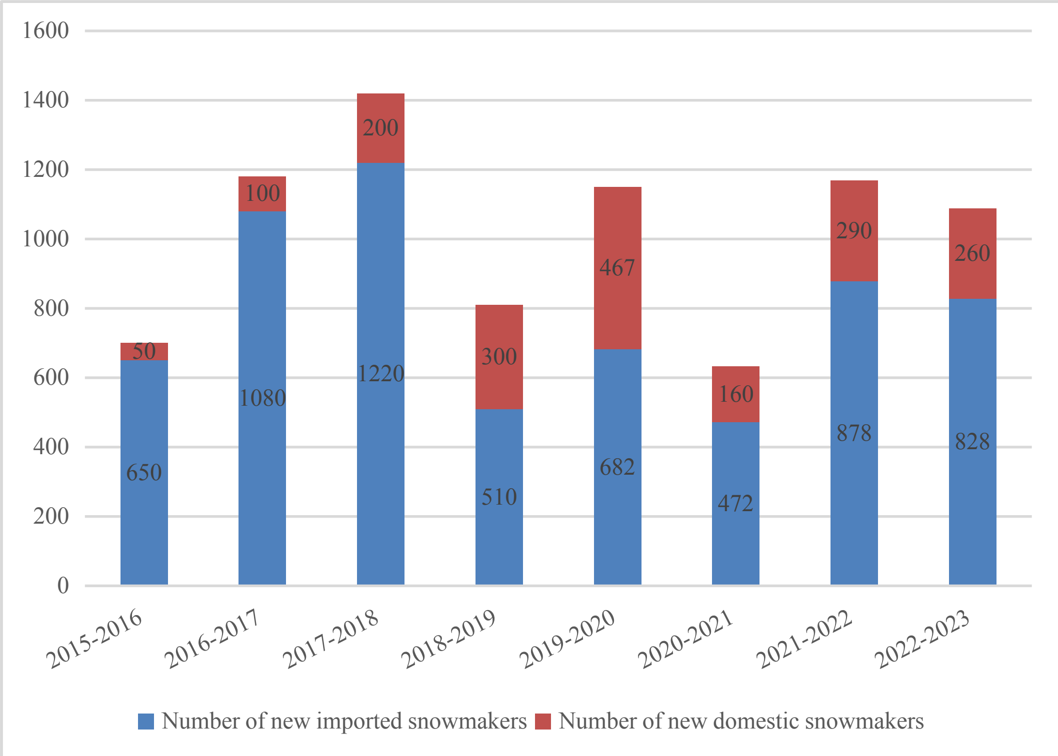


Figure 3-7: The Number of New Snowmakers in Ski Resorts

In 2022-2023 snow season fiscal year, there are 1,088 new snowmakers in ski resorts across the country, a slight decrease of 6.85% compared to the previous year.

III. Rental Equipment in Ski Resorts: Rental Ski

The ski rental market continues to show strong growth. On the one hand, outdoor ski resorts have a demand for replacement of rental boards; on the other hand, indoor ski resorts have become the main force in the increasing rental board market. In addition, like the previous year, in the fiscal year of the 2022-2023 snow season, ski resorts across the country generally reported that the demands for snowboards have clearly entered an outbreak period, and there is a serious shortage of rental snowboards in ski resorts.

Chapter IV. Summary

From the data in multiple dimensions in 2022-2023 snow season fiscal year, it is not too arbitrary to say that there has been a serious unbalanced development between the supply side and the demand side, while the growth of the supply side has not been transformed into a well-matched growth of the other side. Other market characteristics basically maintained the curve of the previous year.

After examining and analyzing various data and removing the disturbance term, we would make the following summary as reference opinion:

1. The recurrence of the epidemic in the second half of 2022 and particularly the major changes in the domestic epidemic prevention & control policy at the end of 2022 had adversely affected the performance of the ski market, thus resulting the shrink of the number of skier visits as demonstrated in this report.

2. Judging from the classified statistical data, it can be seen that the concentration in the market continues to intensify and the Matthew effect and polarization of the market as a whole are becoming obvious.

3. With respect to the supply side, the momentum of new construction, renovation and expansion of ski resorts is still strong. In general, the supply of ski resort equipment and facilities has not been too much impacted by the epidemic.

4. Indoor ski resorts are developing at an astonishing speed and are gradually becoming the most important players in the ski market.

As usual, this White Book omits the analysis in respect of skier's behavior characteristics and skiers' equipment, though those topics are also critical to gaining a deeper understanding of the ski market. For those who may be concerned, it is recommended to read relevant reports released by platforms such as Tmall Ski, Huabei (Ski+), LeBingxue, HuaxueZoo (iSNOW/HighSnow/IceMini), and GOSKI.

Appendix: Index

Introduction to the Author

Wu Bin (Benny Wu)

Mr. Wu Bin is the Founder and CEO of **Beijing Snowpal Enterprise Management Co., Ltd**., author of ***China Ski Industry White Book***, editor-in-chief of ***Ice and Snow Blue Book***, vice chairman of **Beijing Ski Association**, and distinguished expert lecturer of **Beijing Sport University**. Before he founded Snowpal, Mr. Wu had been President of Carving Ski Group, Chief Strategy Officer of Vanke Group Ice and Snow Division, Deputy General Manager of Golf & Ice and Snow Department of Beijing Wanda Cultural Industry Group Operation Center, General Manager of Jilin Beidahu Ski Resort, General Manager of Hebei Chongli Duolemedi Ski Resort, Marketing Director of Italian Tecnica Group China (Beijing) Company, Executive Director of Beijing Snowfavor Sporting Goods Co., Ltd., etc. He has been committed to promoting the development of the domestic ski industry for a long time, and has in-depth research on the international and domestic ski industry.

Introduction to the Translator

Yuxuan Chen

Ms. Chen is a partner of **Beijing Yuanhe Partners**. She is licensed as a lawyer in China and New York State, as well as a patent attorney in China and the US. Ms. Chen is an off-campus postgraduate tutor of China University of Political Science and Law, and a distinguished expert lecturer of Southwestern University of Finance and Economics. She focuses her practice on enforcement and litigation action in relation to IPR and is experienced in advising multinational technology companies in the establishment and implementation of comprehensive IP protection, licensing, and corporate transactions.

Yuanhe Partners is a partnership law firm headquartered in Beijing, and has also set up branch in New York. Founded in 2011, with all its partners and consultants having outstanding backgrounds in legal education and had long been practicing in leading law firms in PRC and the USA, Yuanhe has been committed to providing quality services to customers domestic and abroad, especially in the fields of intellectual property, pan-entertainment law, sports law, dispute resolution, capital markets, US operations, compliance, and administrative legal affairs, and is a provider of high-end services and high-quality resources.