Outdoor performance apparel 2016: A broader perspective

Description: As recently as 2013, sales of outdoor performance apparel were growing at a rate of 6% in the US; by 2.5% in Europe; and by double digits in emerging economies. Outdoor industry sales were outpacing fashion sales, driving an explosion of new brands and “performance” spin-offs, along with a vast expansion of outdoor retail sites and sales channels.

Those were the good old days. In 2016, the call of the wild sounds a lot different. While interest and participation in the outdoors is growing, the outdoor consumer is changing, becoming younger, more diverse, and more social.

The lines between outdoor activities are blurring, while sales of traditional outdoor apparel, engineered for specific activities, are stagnating. Today's outdoorists are searching for hybrid outdoor apparel with versatile functionality, rather than purchasing activity-specific kit.

“The industry has been obsessed with the core adventurer, but that's not the way most people now experience the outdoors,” explains Michael Cattanach, global product director for performance fabric innovator Polartec.

This report gathers retail market data (for outdoor industry totals and outdoor apparel) for US, Europe, China, South Korea, Australia, Japan and India.

Online sales in China soared by 61.7% last year, comprising 28.4% of the country's core outdoor market, but the report suggests international brands who are trying now to penetrate the Chinese market will no longer find an easy source of quick money, but will have to do their homework skilfully to be successful.

The report explains the current retail landscape worldwide, with coverage of major retail brands' latest activity in key markets. 2015 sales results are provided for over 50 core outdoor retailers and over 80 worldwide brands.

A round-up of the latest technology covers many important recent innovations and announcements by manufacturer, across sustainability, odour control tech, thermal regulation, lightweight innovations, stretch fibres, speed manufacturing and wearables.

New outdoor activities are discussed, including the growing popularity of trail running, cycling, camping, adventure travel, indoor climbing and “hipster hunting”.

Finally, the report concludes with analysis of current manufacturing business models for sourcing and selling outdoor apparel. We suggest what may lie ahead in the short-term future and how key players may need to change their businesses to fit the new norms.

Quotes are provided throughout from many of the industry's leading suppliers, brands and retailers.

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