

STATE OF TRADE 2014 OUTDOOR MARKET

EUROPEAN
OUTDOOR
GROUP



MARKET SUMMARY 2014



€4.8BN WHOLESAL VALUE



€10.2BN RETAIL VALUE



1.2% VALUE **1.4%** VOLUME

COUNTRIES

Shrinking of Russian economy brought the overall market down:

- Annual market growth, excluding Russia, 2.7% value and 2.3% volume
- Largest markets Germany, UK and France were solid growing 2-3% in value
- Southern Europe continues to make a good recovery with Spain and Italy up 2.5% in value
- Scandinavia is a buoyant region growing around 3% in value, with the exception of Finland, affected by the situation in Russia
- Eastern Europe has been steady overall with growth at just under 3% in value

PRODUCT CATEGORIES

FOOTWEAR led the growth, up 2.8% in value and 4% in volume



€1.3BN WHOLESAL **€2.7BN** RETAIL

APPAREL the largest market is effectively flat with less than 0.5% growth



€2.5BN WHOLESAL **€5.3BN** RETAIL

WEATHER mild autumn/winter impacted markets and led to early discounting at retail



FUTURE OPPORTUNITIES



Retail consolidation and more sophisticated consumer purchasing is providing new opportunities for the outdoor sector.

To help retain existing customers and encourage new customers to participate in outdoor activities.