Outdoor apparel collections have shifted gradually from general purpose to sports-specific ranges following a pattern similar to the evolution of performance fabrics. As the market matures, new ranges focusing on particular user segments have expanded the options available to designers, highlighting a key trend that drives the outerwear market today.

Single purpose versus versatility in functional outerwear

There was a time, recalls Fredrik Lundberg, Haglöf's strategic design manager, when it was 'smart' to wear a ski jacket in town. Those days are gone, he says, as people no longer want "to look like they've just come off the slopes". His remark echoes one from Jean Holvoët, Rossignol's textile general manager: "Our clients want to look good on the slopes, but they want to look even better off the slopes." This is especially true, he points out, in the premium market. "A jacket made for a specific sport must have all the necessary technical features and details, no compromise allowed. A jacket made for urban uses won't need all the fancy functionalities, the adjustable hoods, snow skirts and inner wrist cuffs, but it will be made in the same fabrics as the performance garments and it should also be designed without compromise."

Colmar general manager, Giulio Colombo, shares a similar view, noting that skiwear is a limited market. "It is estimated that there are some two million skiers in Italy who ski 10 to 15 days per year," he says. "The fashion market has a much larger consumer base." He sees the rise of sports influences in high fashion as a positive trend because it implies that consumers are looking for "performance features in their everyday clothing". This is where the brand's range of TechnoDown jackets, made with natural down that is given a DWR finish for added protection, is positioned to gain a growing market share.

Based in Monza, Italy, Colmar develops two distinct lines that are identified by a specific logo (Colmar and Colmar Originals) to clearly delineate each type of end-use. The collections are presented at separate trade shows (ispo or Pitti) and sold in different retail channels. Colmar launched its lifestyle collection six years ago, delving back into its archives for inspiration. "We mix our sports performance DNA with a touch of vintage fashion," says Mr Colombo.



Primaloft no longer wants to be known as the "down alternative" but rather as a provider of "comfort solutions," declared Primaloft CEO, Michael Joyce, at a press conference at ispo. The new Primaloft Gold and Silver intimate blends with natural goose and duck down have been adopted by La Sportiva for belay jackets that feature body-mapped down panels in different shapes for men and for women.

Primaloft / La Sportiva

No compromise

Like Colmar, Rossignol, based in Saint-Jean de Moirans, France, is also branching out from an only skiwear brand to casual wear, while using the same materials in both ranges. "That is what our buyers are looking for in the casual wear lines," says Mr Holvoët, while stressing that

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Canada Goose has a long history of outfitting polar expeditions. "The technology trickles down to any situation in which the user is mostly static and in a cold environment," says Spencer Orr, the brand's head of design and merchandising. As such, many styles, including the pilot bomber jacket Chilliwack and the Constable jacket, are worn for everyday.

Canada Goose

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Colmar has created a capsule collection dedicated to the five continents in honour of the coming 2015 Milan Universal Exposition. Each jacket highlights the cultural heritage of one of the five continents - Africa shown here.

Colmar

garment designs are carefully tailored for each market. "The sports collections will have ergonomic fits that are not desirable in urban clothing," he points out. The brand transposes its technical expertise acquired in performance apparel to its urban ranges. "We have the fabric know-how to address the need for comfort and performance, which are real demands in the non-sports specific market."

Yet Jean Holvoët does not see demand growing for crossover styles: "Moncler really took off when it began to develop super-glamorous down jackets designed for the city. A few years ago, Aigle's yachting jackets were very popular in urban environments, but they are nowhere to be seen anymore." This is a clear sign that consumers want the performance, not the look, of performance sportswear, he says.

Transposing highly functional materials to new markets is also under way in the sport chic category, as seen at Newland, a sportswear brand developed by Italy-based knitwear manufacturer Athesis in Verona. The company is introducing a patented technology, called Dry Heat, which combines Aquafil's polypropylene microfibre Dryarn (65%) with a nylon/Lycra yarn (35%). The polypropylene is dope-dyed, washes at low temperatures and does not require ironing, giving it an environmental edge. However, it is the refined aesthetics and soft hand-feel of the fabric that strike the senses. "Heat Dry is a good alternative to wool," says company manager, Bruno Dareggi, because "it slows down temperature changes better than wool."

Scandinavian outdoor brands have a particular outlook on the evolution of outerwear from general purpose to single purpose. For years, their collections focused on protection and catered to all needs, as befits the rigorous northern European winter climate. "Ten or 15 years ago, the industry was quite different," says Mr Lundberg, Haglöfs strategic design manager. "Most collections were made of generic outdoor products, there were no specific ranges for fast hiking or trail running." He has noticed a change in focus from generic to single purpose in the past four or five years. "One reason for this shift is internal. Haglöfs was making generic products that were good for many purposes, but perfect at nothing, with the result that, as the range expanded, the products ended up all looking alike. We needed to introduce elements of differentiation, which we did by targeting specific uses, and this opened up a whole new world of options."

In 2007, Haglöfs introduced its first range of clothing targeting high-pulse outdoor activities. "We were sponsoring an adventure race team and had no products in our collection that fulfilled all the team's needs. At the same time, we began to realise that these high-pulse activities were blossoming into a major market in Scandinavia," recalls Mr Lundberg. "In addition, we also learned about these users' specific needs, and discovered new concepts that could be useful in other market segments."



Rossignol's textile general manager, Jean Holvoët, believes in a no-compromise approach to performance and comfort whether the garment is made for a specific activity or not. In cross-country skiing, close-fitting ergonomic designs are a requisite.

Estelle Rancurel

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Cut in a single piece of fabric that combines standard polyamide with high-tenacity Cordura, the Fuse Uno jacket by The North Face features a highly innovative approach to pattern-making, with the result of reduced seaming and taping without sacrificing performance or ergonomics.

The North Face

For Fall-Winter 2014-2015, Haglöfs is launching its first urban range, called 19Fourteen in honour of the year the brand began manufacturing backpacks. In this new collection, the women's Lima jacket merges high function with urban aesthetics and was awarded a Gold Medal in the Outdoor Lifestyle category at ispo 2014. "There is a fine line between performance wear and everyday wear. A product that is too casual will not be coherent in Haglöfs' environment. We worked hard to find the right balance, the sweet spot, where functionality meets versatility," says Mr Lundberg.

The move to introduce a clearer segmentation between extreme and everyday uses is spreading throughout the outdoor market. In 2010, The North Face split its ranges into two categories to make a clear distinction between the need for versatility as opposed to sport-specific uses. This was expressed by a concept the brand calls its Activity Based Model (ABM), which is used both internally by company staff and externally by retailers and consumers to assist in identifying exactly what a user needs, says Mark McCarthy, outdoor and summit category manager. He adds that the brand's ranges are increasingly "funnelled".

The most versatile product at The North Face is the now classic three-in-one Tri-Climate jacket. "This type of product speaks to consumers looking for added purchase value as they essentially get three jackets in one," says Mr McCarthy. This is an area where there is a lot of room for variation: "There was a near overnight shift to ThermoBall jackets used for the insulating middle layer. But now the pendulum is swinging back to fleece for the inside jacket. High loft fleece has high cosmetic appeal and is tangibly different from classic fleece." Recent growth in the micro warmth category is a sign, he says, of the continuing need for versatile, year-round products.

At the other end of the spectrum, in The North Face's alpine Summit category (representing 25% of sales), Mr McCarthy sees a growing trend for refined looks and softer, lighter-weight fabrics. Among the new developments featuring an advanced design, the Fuse Uno jacket is cut in a single piece of fabric. The fabric itself is a dual-composition textile combining standard nylon with high-tenacity Cordura. The weft of the fabric changes midway through the weaving process from 100% standard nylon to nylon blended with high-tenacity Cordura. On this fabric (laminated to a microporous PU Hyvent Alpha membrane), a complete jacket, sleeves and hood included, is "stamped out" in a single piece. The Cordura portion is placed on the top part of the jacket most prone to wear and tear. Once stamped out, the whole jacket is ready for sewing and seam-taping. The novel pattern-making drastically reduces seams, which are covered with 19 mm or 17 mm tapes, depending on need, to further shave off weight. The first of its kind, this minimalist yet fully functional and ergonomic jacket is currently being tested at the Base Camp of an expedition to Annapurna.

Lima jacket from Haglöf's newly launched 19Fourteen lifestyle range.

Haglöfs



From specific to generic

The paragon of an extreme, single-purpose driven brand, Canada Goose is slowly expanding its scope away from its long-standing made-for-the-Arctic collections. As a cold-weather brand, it tends to favour function over form, the best examples being the Snow Mantra and Exped - ition parkas. These heavy down jackets are made in a sturdy fabric that need not be waterproofed as it does not rain in the remote regions the brand's garments are made for. Moisture vapour transfer is also not a key function, as the clothes are designed to

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keep the mostly static users warm. Among their many features designed for extreme cold conditions, two zippered openings on the side seams of the jackets enable direct access to pockets without having to open the central zipper. "The Arctic climate presents a specific set of conditions that Canada Goose has a long history of addressing," notes Spencer Orr, the brand's vice-president of design and merchandising.

Five years ago, the Canada Goose collection consisted of 35 pieces, it now counts 270 models, including accessories, says Mr Orr who likens the evolution to "a stepping-stone process" from single purpose to versatility. The brand doesn't target specific activities in its newly minted shell collection. "We let users decide what they want to do, be it fishing, walking or hiking. The fabric will protect them whatever their activity," he says. The protective shell jackets do not have a snow skirt, but are cut longer in the back. Pockets are placed so that a user can access them wearing a harness, and the hood is designed to be helmet friendly. In addition to the shell category, Canada Goose is also expanding its slim down category, picking up on the growing trend to wear lightweight insulating jackets all year around.

In another recent development, Canada Goose is introducing new features to its alpine range. The brand is outfitting an expedition to the South Pole later this year. Called Go Beyond Rescue, it is an unsupported record attempt from the edge of the Antarctic Land Mass to the South Pole, from the Ross Ice Shelf via the Axel Heiberg glacier and over the Transantarctic Mountain range. "We are working closely with the team to integrate the functions they need. They need garments that will move with the body. Our Snow Mantra jacket weighs 6 to 8 pounds [up to 3.6 kilos], depending on size, and was considered too heavy. This is why they will wear our alpine jackets to which we've added fur-rimmed hoods to protect the face from frostbite," details Mr Orr. This venture could lead to a new product category for the brand.

As brands expand their territory, targeting either extreme or everyday uses, they are naturally inspired to develop ranges that will address their specific needs. It's a matter of maturity, says Fredrik Lundberg, at Haglöfs, who believes the single purpose model currently dominates the outdoor industry. That said, he further remarks that demand for versatility has not disappeared. "We continue to make products that can be used for skiing 10 days a year, and for ice-skating and hiking." In other words, it's not all black or white. Few things ever are.

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