Bicycle road racing is an international sport – and maybe the only one in which World Championships or Olympic Games are valued less than the three grand tours. Even many single stages of 'Le Tour' or some of the classics are more popular and prestigious amongst professionals. Cycling wear builds on these myths. But what really brings in the cash is not the replicas but the bike wear you hardly ever see on TV— leisure bike wear made for road and trail biking with high-end functionality.

Myths in yellow, pink and green

The three grand tours in bicycle road racing, 'Le Tour de France', the 'Giro d'Italia' and 'La Vuelta de Espana' have set the standard for cycling jerseys. Yellow, green, polka dot, pink, purple or gold are the (jersey) colours that every cycling professional dreams of because they have to win them to wear them. However, millions of fat-bellied leisure cyclists buy them every year as there is a myth that surrounds these famous jerseys. Funnily enough, that's not what one can seriously say about the Road Race World Champion's jersey – which is, by the way, the Rainbow Jersey.

Replicas depend on success

Replicas – the copies of the original professional team jerseys – are somewhat equivalent to football team jerseys, but only to a small extent. From a sales point of view, these replicas and football jerseys are miles apart. They lack the identification with a single hero through having a name and number printed on the back, and the style is too specialised to wear in everyday life. Cycling wear replicas are bike jerseys in terms of both cut and style i.e. slim-fitting, figure-hugging, and are cut longer at the back with pockets. This makes them a specialist cycling jersey and not a sportswear or leisure shirt—and therefore replica sales are limited.

Most of the professional teams come from four principal countries: Italy, France and to a lesser extent Spain and Belgium. Other countries—if they have any at all—have one, or maybe two high ranking professional teams that participate at the three grand tours. Similar to Formula 1, the professional teams are financed by national or international companies. Some bike apparel companies also sponsor race teams. Craft, for example, sponsors Swiss Pro Tour Team Phonak and offers a complete Team Phonak collection designed by Swiss racing legend Tony Rominger. The collection consists of a short-sleeved and long-sleeved jersey, a bib, race socks, gloves and a summer hat. This Swiss connection has helped Craft to secure the licence for the set of leaders' jerseys for the Tour de Swiss. However, few other companies support professional teams. Most team licences are divided between two Italian brands, Nalini and Santini—the adidas and Nike of bike wear. Famous teams such as Crédit Agricole, Kaiku, Gerolsteiner and Acqua&Sapone wear Nalini, whilst Bianchi, Saeco, Colombia – Selle Italia and Mapei race in Santini jerseys. The latter also has the licence for the Giro d'Italia Collection and the World Championship line.

Most companies share Löffler's stance and prefer to stay away from replicas. "For short periods, especially at the time of the Tour de France, they are a big issue, but the risk is high if the team isn't first in the field," argues sales director, Hermann Grundner. Unlike football there is little affection for less successful or cult teams nor is there any local identification.

The bread *and* the butter

However legendary the replica jerseys may be, standard cycling jerseys are more important in terms of business. They are the bread and butter of bike apparel, and this is made obvious by the number of discounters throughout Europe that regularly have bike shirts in their ranges. However, it seems that discount jerseys are no competition for the specialised bike apparel industry with its high function jerseys. Discounters are more annoying for the catch-all-sportswear companies for two main reasons.

Individuality leads sales

For the discounter, to sell a viable amount of cycling jerseys the products have to appeal to the masses, which means they stock simple standard products in plain colours or regular colour blockings. But cyclists, even though they



depend on teams, are individuals. There are climbers, sprinters, team workers and only a few are exceptionally good at all disciplines, and therefore, they are very individual characters. This individuality is not only a characteristic of the pros. From the top down to leisure bikers, cyclists are characterised as individuals who want to stand out and bike jerseys reflect this thinking in both design and style. All cycling apparel brands produce wild colourful picture prints in small numbers that are only available during one short season. Castelli's 'Protector' jersey with an armour print is an example just as is Canadian brand Sugoi's 'Fritz Jersey' that shows a pixie looking out of an old VW camper van along an endless road. The same applies to Pearl Izumi's Original Jersey line with 'Bert and Ernie', 'Avery Beast', 'Coca Cola' or' Wheaties' prints. And prints are not limited to men's jerseys. Women just wear different images. Pearl Izumi calls its women's styles 'Flower Power', 'Rocket Girl' and 'Sea Angel' whereas Gonso's features very feminine colours showing flamingos and peacock feathers in 'amarena' and 'candy'.

A step ahead in function

The specialised bike apparel industry has another advantage compared with cheap discounter bike wear. The products outperform the gear on offer at the discounters by literally miles. There are again two reasons for this that are rooted in the nature of the business and cannot possibly change. Again, discounters can only sell large volumes of a product because it is cheap. But to be able to make it at low cost, it has to be basic, so discounters will never be able to offer advanced function.

The second point follows the first. When selling cheaply, out of necessity you have to cut back on the customer advisory service – which is what all discounters in fact do. However, then it is impossible to sell large numbers of a



Bright feminine colours as featured in Gonso's latest cycling apparel.
Gonso

functional product which has to be explained in detail by qualified staff. Thus, the only possible solution is to sell products with well-known functions. This means that discounters have to wait until knowledge of a fabrics' performance and its function has trickled down into larger parts of the population and that takes time.

The main—and usually the only—function discounter jerseys offer is breathability. But that's old hat. All poly-fabrics absorb little moisture and dry quickly. Breathability is a *conditio sine qua non* (without which it could not be) at the lowest possible level. In fact, bike jerseys should at least be made of a fabric that actively wicks moisture away from the body. Two-sided fabrics or special knits have a push-pull effect that increases moisture transport in terms of time and quantity. Next to moisture management, possible functions are lightweight, insulation and temperature regulation, elasticity, UV-protection, anti-odour, water and wind resistance, and visibility. Advanced technologies that are used include nanotechnology, welding, body mapping and seamless knits.

High in function

Every bike apparel company has a line that it considers to be high-end and in which it uses the "highest quality material and the most advanced production techniques". Italian bike wear specialist Biemme calls its top end range the 'Activitude'-Line. It is designed solely in black and white and the race jersey is made of 'DryEffect', a '3max Fibre' that can absorb humidity and carry it to the surface thanks to a capillary effect. Its structure also gives the fabric an Ultraviolet Protection Factor (UPF), and the fabric uses Sanitized as an antibacterial agent against odour. For all those who prefer a bacteriostatic approach to odour prevention, Biemme also produces jerseys made of 'Silveraid', a fabric with the threads coated in pure silver. Competitor Castelli has three new jerseys in its 2006 range each featuring a different fabric. The 'Barros' jersey (women's 'Cocoa') is manufactured from multi-layer polyester produced with seamless body mapping technology. Castelli touts this jersey as "the most appropriate piece of apparel to cross the dogged heights of the Pordoi Pass" because of its ability to cope with sweat. In contrast, the 'Hockenheim' jersey is made completely of mesh fabric, which is particularly well-suited to extreme hot weather conditions.

The third novelty is the 'Puzzle' shirt made of double polyester designed specially for rugged use. The third Italian brand Briko promotes the exclusive Meryl fibre in its high-end range called 'No Gravity', produced in a hollow polyproylene fibre. The jersey features wicking performance with a water repellent finish, better temperature regulation, and insulation while resting. It is anti-allergic, bacteriostatic, UV-resistant and non-pilling. It's produced with seamless technology and comes with arm warmers.



Cyclists are individuals and want to stand out from the crowd.

Pearl Izumi

The cost of high-end shirts such as these is much higher, but they seem to have no problems succeeding in the market. Ludger Tabeling from leading German bike specialist company Gonso has had the same experience. "For 2006 we designed a high-end jersey that cost twice the price of our next shirt in line, but it sells better," says Tabeling. "There seems to be substance to the saying that what's cheap can't be good." Gonso also uses a Meryl fabric it calls 'Hightex Sensitive' but it's a 72% polyamide and 28% elastane mixture. Gonso uses welded seams for its 'Merkur' jersey, showing highest standard of production, and in terms of function, 'Merkur' can easily keep up with Briko's 'No Gravity'.

Canadian bike specialist Sugoi uses body mapping in its 'Tactic' jersey, which it sees as its "most progressive jersey" with "three levels of Tone Construction Venting within one non-seamed fabric". 'Tactic' is also the name of the fabric now posted in the internal ranking over 'Technifino' (lightweight) and 'TechniFine' (mesh) and 'Vector' (hot days) from which cyclists can choose according to their needs. Scott from the

United States presents 'Aerate Technology' as its highlight. 'Aerate Technology' is a replacement material to improve airflow control. It makes zipper ventilation unnecessary, can replace mesh in crucial parts and reduces airflow where perforated fabrics let too much air in. Scott uses this technology in two segments, endurance and freeride.

Eschler also presented a new technology at the recent ispo called 'Ceramic Printing', which is an environmentally friendly finish that integrates diamond hard ceramic particles in a polyurethane coating. Applied to apparel, 'Ceramic Printing' has proved, in testing, to provide more resistance to chafing and reduce the danger of painful abrasions. Eschler says that the new finish is ideal for cycling apparel and can be applied to just about all of Eschler's fabric collection.

Off the beaten track

One of the fastest growing markets in the last decade has been mountain biking (MTB) and the fact that it has become an Olympic discipline only underlines this. The Italian Dolomites, the Alps, the French Massiv Central, the German Mittelgebirge and the English Lake District have all become mountain bike regions with good reputations. Cross-Alp tours are a new adventure many mountain bikers are ready to face. The classic route from Obersdorf in Germany to Riva at Lake Garda in Italy is a challenge for mountain bikers comparable with the Berlin or London Marathon for runners. And, of course, the American National Parks are mountain biking paradises par excellence. As a result of this increased popularity, the demand for appropriate bike wear has grown quickly and quite a few bike apparel companies differentiate an MTB-Line from their classic Road collections. Those whose collections are more performance based, i.e. Sugoi's Power-, Core- and Advance-lines, have recently integrated mountain bike styles in their lines with style as the main difference.



Sugoi has incorporated mountain bike styles into its performance lines.

Sugoi



Salomon's Dirt Jersey.

Salomon

MTB-wear is less athletic, less fitted and more casual and cooler. Baggy bike pants lend themselves to matching T-shirts, rugby shirts, and even real collar shirts, as long as they're cool and offer similar functions as road bike jerseys such as wicking performance, silver technology, and UPF protection. Nobody wants to miss out on functionality and because of this sportswear and outdoor companies have become competitors having both entered the MTB play area – much to the chagrin of bike apparel companies.

Salomon's 'U Dirt Jersey' or its 'X-static Shirt' are characterised as bike apparel in an outdoor performance collection with the main focus on trail running. The same applies to The North Face's 'Tekware' that is seen as a multi-functional line equally made for hiking, bouldering, trail running, travelling, biking or just hanging out. Meanwhile, Patagonia's 'Endurance Line' has defined single trail as an outdoor sport just as fly-fishing, trail running or horse riding are.

Bike apparel companies have recently started to shift the mountain bike image towards a more sporty approach (MTB competition) or free style activity (downhill) that doesn't quite fit the nature-seeking outdoor community. One could call it an adrenaline approach, making MTB even younger, more shocking and jarring. To take it to an extreme: downhill riders don't dress in upright outdoor apparel and outdoor mountain bikers don't compete in competitions that end by hurling the bike as far as possible. In terms of apparel, the latter wear prints and use typefaces that are reminiscent of hard rock and hip hop music – only with a functional basis.