

Brands hoping to score a success on the pitch

As the World Cup in Germany approaches, the effect on soccer fans and the industry's major apparel suppliers is clearly evident. But the World Cup is just one of several drivers of the sector which is seeing phenomenal growth.

A study by the Sporting Goods Manufacturers Association (SGMA), a leading US industry trade group, says growth in soccer is coming from many sources including increased participation in schools and community leagues.

Adidas and Nike dominate the soccer apparel scene in the United States, controlling an estimated 75-80% of the growing team and retail market, which industry observers believe to be worth in the region of \$200 million. Adidas has the lion's share, controlling somewhere between 40-50% while Nike's share is in the 25-30% range, according to industry estimates.

When asked by WSA about the state of soccer apparel in the US, four of the industry's major brands, adidas, Nike, Diadora and Puma, pretty much agreed on where the US soccer hotspots are. California (especially Los Angeles), Chicago, New York and Texas are the main spots whilst New Jersey, Florida and St. Louis were also mentioned as centres where soccer is popular – and the World Cup is fuelling this passion.

"The World Cup, as it has historically, has had a tremendous effect on sales so far," says Michelle Bender, adidas category manager for US soccer apparel. "We launched our first World Cup kits at the end of November and our home kit sales have been phenomenal. Our official licence products range across all countries that really celebrate soccer and know what the World Cup is about. We've definitely seen a buzz about the World Cup."

Mass appeal

Bender adds that many different types of consumers are in the market for soccer apparel. "There's the classic core soccer look. There are also the kids who want something edgier, faster. No matter what the look, we stay with performance fabrics because at the end of the day, the athlete comes first.

"In the marketplace, we



Roma's Francesco Totti sporting the club's Diadora supplied strip.

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are seeing a lot of country-based packages, trying to capitalise on what the World Cup is all about. There's a lot of that this year, with a trend towards cleaner looks so to speak. That will probably go forward into 2007, even in footwear."

She states that post-World Cup sales in the US will depend on the success of the US team, "If the US is successful, it will benefit soccer all around. Major League Soccer (MLS) players will continue their success into the league. The momentum could continue until the women's World Cup in China in 2007." And the women's market is one that adidas is also concentrating on. "The biggest thing with women is fit and it all comes down to making sure you have the fit right. Women have the same performance needs whether it's on the field or in training gear. For off-field, you want colours that work well for women. You make sure you have more of a lifestyle appeal," adds Bender.

Performance-wise, wicking is the key, she adds, and adidas' Clima 365, Clima Light and ClimaCool garments all provide it. ClimaCool is an integrated system of technologies that regulate body temperature by conducting heat and sweat away from the body through heat and moisture-dissipating materials, ventilation channels and three-dimensional fabrics that allow air to circulate.

In developing the system adidas used body mapping to ascertain the major heat and sweat zones, which enables it to position the technology in the optimal positions.

Adidas' ForMotion technology is also integrated into the professional shirts and shorts. This technology, the result of four years of development, offers improved fit to allow for optimal football specific movement, whilst also providing support.

On the sidelines

Peter Hudson, global creative director for Nike Football, says his firm has re-balanced its focus between the on-field product and the off-field replica garments for fans. He notes that there's a strong relationship between the two sides of the business.

"We have focused most recently on the sport side where it's all about making it authentic and keeping the performance level relevant," Hudson says. "[The apparel] has to work so the players give their best 90-plus minutes for the game."

He says that Nike's Sphere Dry product, which keeps players comfortable and dry during games, is its major performance wear focus in soccer.

"Players, when they play for their national team that they revere, it's an amazingly proud moment. When I work with a design team, we spend a lot of time making sure that even before players touch the field, they feel incredibly proud. We are making a product that feels like high fashion in some ways. When you marry that with performance, you have the perfect product."

Hudson says Nike has also invested considerable energy over the last couple of years

into the off-field side, developing garments that cater to the soccer culture around the globe. He says the kits worn by teams that have come and gone in the US and around the world can often provide inspiration.

"Numbers, badges and crests are among the items that are important to the game and we can take inspiration from them," Hudson says. "Fans can be looking in a store and see something that just looks cool and not really understand where it comes from. You can go into these details, drawing out the culture of the past and blending with the present to create a product that's cool to wear."

Hudson says team players want to focus on the game without distraction. Their main requirement is comfort, he says with fit being of great importance. "Our kits fit slightly snuggier than most, providing comfort, especially when it gets wetted out with sweat. Nike Sphere Dry wicks sweat away from the body, creating a micro environment around the skin. That's really what it's all about, comfort from the feet, where you've got to get the socks right so they will work well with the shoes and then the shorts and the jersey."

For fans who like to wear replica jerseys, comfort is also important, but Nike addresses that in a different way, using natural fibres such as cotton that feel good on the body, particularly for women. Meeting the demands and needs of female soccer players and fans also benefits everyone, Hudson says. "We've found that women are very fastidious in terms of the way the garments fit. So, if we can get that right for women, we know we can get it right for men. Detailing is very important. Men always get more than they ask for. From the sports culture side, we try to get the silhouette right so it's cute and fits the body. It's more important for us to fit the women and the girls in a product that really looks awesome."

Another demographic, the growing US hispanic community, is also bringing its apparel preferences to US pitches. "Hispanic people have brought part of their world to the US and that's cool," Hudson says. "It only helps the US to understand the global nature of the game. Those guys are unbelievably passionate about their culture. If you get it right for them, then you have set the bar at the right level."

Core following

Diadora America has carved out a respectable third-place niche in the US market with an approximate 9% share. Debra Wachter, its marketing manager, says European styling is apparent in the US this year with strong sales for replica jerseys and that team apparel is the company's biggest growth area.

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 adidas



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Kyle Mertel, Diadora America's national sales manager, agrees that the World Cup is a major driving force in soccer garments. He says apparel revolves around countries and national teams with a lot of visible flags and "bold, in-your-face text and verbiage" on shirts and jackets.

"There's a lot of showing of spirit for teams and countries," Mertel says. "That's definitely where 2006 is headed. Most retail apparel sales are driven around replica sales.

"On the team side, trends are definitely toward technical fabrics. Manufacturers are making such great products at great price points. There's a lot of creativeness with engineered venting, moisture management technology and unique design lines. But you can't get too crazy on the team side. You still need to have a dominant single colour in team uniforms with six to eight different colourways available."

Mertel adds that the women's soccer market, especially on the youth side, is another major growth engine this year. "Every manufacturer is expanding for the women's market. Three years ago, there were really no styles available just for women. Now, there's women's apparel, women's socks and footwear. This is true from the youth side all the way up to the collegiate and professional side." But, he is quick to remark that while some women are gravitating toward women-specific clothing, many still wear unisex uniforms.

As for the Hispanic market, Mertel says manufacturers are still trying to figure out how to cater for it. He says it's tough to gauge the size of the Hispanic market for soccer apparel in the US as Hispanic preferences tend to be different in colourways and footwear, displaying a desire for more whites, reds and greens.

"(Hispanics) are very loyal to their home countries. It's a market that so far is pretty much untapped here in the US."

Construction-wise, Diadora uses a lot of Meryl fabric and offers compression fit and moisture management with silver ions in the mix to control odour. "It's very high-end," Mertel says. "We are trying to stay with our roots as an Italian company. We're targeting players who like fast-looking, cool uniforms. Our market is the player that doesn't want to be like everyone else."

Diadora America began a four-year deal in January with the Atlanta Silverbacks organisation, which is creating a complete soccer club in the US, based on the models used for more than a century in Europe, Latin America and elsewhere around the globe.

A different perspective

Meanwhile, John Stevenson, vice president for performance sports for Puma North America, has a somewhat different take on the World Cup's effect on apparel sales.

"In my opinion, with licensed products aside, I do not think apparel sales in traditional doors will be much affected by the World Cup," Stevenson



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 Diadora

says. "Though they've now been out there for a long while, non-licensed country specific garments are doing well for Puma. With 12 of the 32 qualifiers representing the Puma brand on the field, we anticipate there will be a huge peak surrounding those teams in Germany. Post-event, we hope our representation on the field can be a driver for key World Cup inspired styles of uniforms and training gear."

Stevenson says the US soccer apparel market has clearly become more performance-oriented on all fronts — on-the-field team wear, undergarments, and products for training.

"Moisture wicking, lighter weight fabrics, improved anatomic fit and technically engineered constructions are now all part of the scene," Stevenson says. "While participation numbers are not showing anywhere near the growth of the 'glory days', the 'spend per player' has definitely broadened in product width and the marketplace continues to be financially sound, usually only moderately affected by the economy."

Stevenson adds that the market is still heavily youth-oriented, but both the women's and Hispanic markets have altered some of the focus. "We are continuing to grow and evolve when it comes to fit and fabrications, particularly for the women specific products. On the Hispanic front, while generally still a little difficult to reach due to ties back to their home countries and brands from there, there are clearly more and more teams both participating and purchasing. When it comes to Puma, we try not to put our consumer in categories based on age or demographic. We think of the consumer mindset and if they fit within our brand."

Stevenson touts Puma's technology, both in apparel and footwear. The 12 teams supplied by Puma will be wearing woven jerseys with welded seams at the World Cup, rather than traditional cut and sew products. "These jerseys will be

functionally more future-forward than anything previously in our industry, with the lightest weight, greatly improved moisture management, and a huge improvement in aerodynamic performance, all benefits to the on-the-field player, both physically and mentally."

A new concept

Developed to boost speed, Puma's v1.06 concept has been specifically engineered to get players to the ball faster.

The v1.06 shirt was engineered and crafted with aerodynamics in mind. Said to be the most lightweight shirt on the market, (the short-sleeved v1.06 game shirt weighs only 109g) the v1.06 game shirt is fully welded with no seams for improved comfort.

Employing its Kold Fusion technology, it provides a performance alternative to classical stitching, forming a strong, light and durable molecular bond. The result is a smooth surface further improving the comfort for the players.

The new specially developed woven fabric, designed in collaboration with Manchester Metropolitan University and Toray Textiles, keeps the weight down to a minimum whilst providing superior moisture management to keep the player dry and comfortable. Limited stretch and a slim fit construction also prevent shirt grabbing. Following windtunnel testing, performed at the Technical University of Dresden, it was shown that the v1.06 game shirt provides players with an explicit aerodynamic advantage, reducing drag and minimising the negative effects of wind resistance. Designed with a high front collar, the shirt prevents wind from entering thus reducing drag, whereas the low neckline in the back boosts airflow. An ergonomically placed stretch insert panel along the back also adds freedom of movement.

And Puma has not stopped at apparel — the German company has looked at the player as a whole and developed a concept product for its professional players which includes the playing shirt, a new boot, goalkeepers' gloves, and even a new ball (although this will not be the official ball at the World Cup).

Also created to get players to the ball faster, the v1.06 boot was designed to create split second advantages. The lightest Puma boot on the market, the upper is constructed from an extremely thin and specially developed synthetic ConTec, a 0.4mm ultra-thin woven synthetic which features a multi-layered PU coating to provide a leather-like fit and touch, increased speed, stamina, and close control. The fine-tuned AptoLast and asymmetrical Lace Wrap system allows the boot to mould to the natural shape of the foot for optimal energy preservation. A new external heel counter with a minimal TPU injected external cage offers stability and protection whilst reducing weight through its unique frame construction.

And a carbon fibre composite outsole solution embedded in TPU, offers excellent pressure

distribution supporting the natural and flexible movement of the forefoot while adding minimum weight. After extensive flex tests, the high performance of this carbon fibre composite outsole remained uncompromised as the unit can safely achieve a flex angle up to 120-degrees.

Technical appeal

It appears that the battle off the pitch between apparel manufacturers is as hotly contested as that of the teams representing their countries' national pride. This is nothing new, since the major brands have long fought to be top of the league in soccer technology, and this competition is healthy for the sports industry as a whole as it keeps pushing the boundaries of technical possibility in soccer apparel. What is possibly more interesting is the new trend for amateur soccer players seeking the same level of function from their apparel as that demanded from their professional heroes and, with the rapid growth in the popularity of soccer amongst women, the market for this apparel is expanding significantly. With this increased demand set to rise further, it is an exciting time in soccer, and not just because of the World Cup. 



Paraguay's Roque Santa Cruz and Senegal star El Hadji Diouf model their nations colours.

 Puma