

Outdoor Industry Weekly Brief

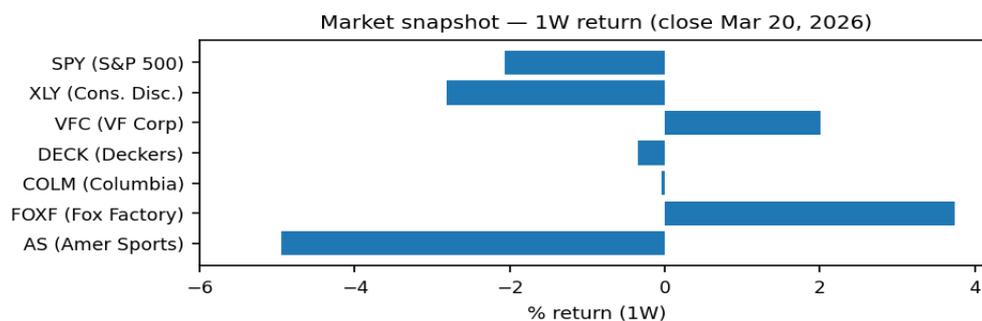
March 23, 2026 · Week 12 (Mar 16 – Mar 22, 2026)

Weekly digest of key signals for outdoor-industry professionals (product → industry/trade → companies/exec → earnings/macro).

Key signals (2–3 min read)

| | | |
|--------------------|--|-----------------------------|
| Materials | The LYCRA Company files a prepackaged Chapter 11 to eliminate >\$1.2B of debt; operations continue normally. | Lycra + Reuters (Mar 17) |
| Trade shows | Performance Days (Munich, Mar 18–19): 515+ exhibitors and a Tech Hub focused on 3D, AI tools and data workflows. | Performance Days (Mar 2026) |
| Demand | Consumer Edge: U.S. sporting goods spending -9% y/y (3 months ended Jan 2026), led by middle-income pullback. | Consumer Edge (Mar 2026) |
| Earnings | Solo Brands FY2025 net sales -30%; Q4 net sales -35% with elevated restructuring/impairment charges. | SEC (SBDS 8███, Mar 2026) |

Market — snapshot (weekly + YTD; close Mar 20, 2026)



| Asset | Close | 1W | YTD |
|--------------------|--------|--------|---------|
| AS (Amer Sports) | 30.74 | -4.95% | -17.70% |
| FOXF (Fox Factory) | 16.08 | +3.74% | -6.02% |
| COLM (Columbia) | 55.23 | -0.04% | +0.25% |
| DECK (Deckers) | 100.43 | -0.35% | -3.13% |
| VFC (VF Corp) | 16.28 | +2.01% | -9.96% |
| XLY (Cons. Disc.) | 107.74 | -2.81% | -9.77% |
| SPY (S&P 500) | 648.57 | -2.07% | -4.89% |

Note: 1W = close 2026-03-13 → 2026-03-20; YTD = close 2025-12-31 → 2026-03-20. Market data: Stooq.

Section summary

Week 12 (Mar 16 — Mar 22, 2026) · Curation: Artiga Partners

Product & Innovation

Haglöfs x Polartec — Standard Issue Black standardizes “black” to cut dye complexity. A shared black standard aims to reduce shade variation, streamline sourcing and lower environmental impact.

Source: Haglöfs (Mynewsdesk, Mar 13, 2026).

Houdini x Demon — Silvestre collaboration blends technical approach-shoe build with refined design. Handcrafted in Montebelluna; paired with Houdini’s circular-design Orange Shell Layer Series.

Source: Houdini Sportswear (Mar 2026) + Outdoor Industry Compass (Mar 2026).

Polartec x Big Agnes — Alpha Direct liner extends warmth-to-weight innovation into sleep-system accessories. Ultralight liner built with Polartec Alpha Direct for breathable warmth.

Source: Outdoor Sportswire (Mar 6, 2026) + Big Agnes (Mar 2026).

Trade & Ecosystem

Performance Days Tech Hub — digitalization moves into sourcing workflows. Tech Hub frames 3D design, AI-driven tools and smart data management as practical levers to speed iteration.

Source: Performance Days (Mar 2026).

Coats — 2025 Sustainability Report hits multiple 2026 targets ahead of schedule. Reported Scope 1&2 emissions down 30% (vs 2022 baseline) and highlights OrthoLite/CirqI materials platform.

Source: Business Wire (Mar 12, 2026).

Forced-labor enforcement — CBP WRO on Giant Manufacturing (Taiwan) remains a live constraint. WRO detains bicycles/parts; Giant continues petition process — compliance can directly block market access.

Source: CBP (Sep 24, 2025) + Giant Group (Sep 25, 2025).

Companies & Executives

The North Face — Global Brand President Caroline Brown exits; Chris Goble to succeed. A leadership variable for VF’s brand reset: product cadence, wholesale re-acceleration, and positioning into 2H26.

Source: WWD (Mar 10, 2026).

Tern — appoints Hanna Grau as GM of Tern ZE (Central Europe distribution). Strengthens distribution/service/dealer support across Germany, Austria and Benelux.

Source: Tern Bicycles (Mar 3, 2026).

Worldly — hires Kathryn Smith as VP, Human Rights Risk Solutions. Signals rising demand for operational social-compliance tooling as buyer requirements deepen across tiers.

Source: Business Wire (Mar 10, 2026).

Earnings, Economy & Markets

Solo Brands (FY2025) — net sales down; restructuring and impairment charges remain elevated. Q4 net sales fell ~35% y/y; highlights discretionary demand pressure and ongoing channel correction dynamics.

Source: SEC (SBDS 8■K, Mar 2026).

The LYCRA Company — prepackaged Chapter 11 to reduce debt and protect operating continuity. Company says operations continue normally; restructuring targets long-term financial stability without customer disruption.

Source: The LYCRA Company + Reuters (Mar 17, 2026).

Consumer demand — sporting goods transactions down 9% y/y (Q4 ended Jan 2026).

Consumer Edge indicates middle-income pullback and tariff/inflation pressure; implies continued promo sensitivity.

Source: Consumer Edge / PR Newswire (Mar 2026).

Tariffs — Section 122 timelines raise uncertainty for late■2026 landed-cost planning. Section 122 authority is time-limited; replacement pathways matter for duty assumptions and pricing architecture.

Source: SGB Online (Mar 2026) + Covington (Feb 27, 2026).

Next dates to watch

| Date | Item |
|-----------------|--|
| Apr 8–9, 2026 | Functional Fabric Fair (Portland) — powered by Performance Days. |
| May 14–15, 2026 | Outdoor Impact Summit — Riva del Garda (Italy). |
| May 17–19, 2026 | ORB Days & Outdoor Trade Show — Riva del Garda (Italy). |
| Jun 2–4, 2026 | OTS 2026 — Liverpool (UK). |
| Jun 16–18, 2026 | Switchback Spring 2026 — Nashville (TN). |

Sources consulted (selection)

SEC EDGAR (Solo Brands) · The LYCRA Company · Reuters · Consumer Edge / PR Newswire · Performance Days · Haglöfs · Houdini Sportswear · Outdoor Sportswire · Big Agnes · Coats · CBP · Giant Group · WWD · Tern Bicycles · Worldly · SGB Online · Covington.

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