Outdoor Industry Weekly Brief

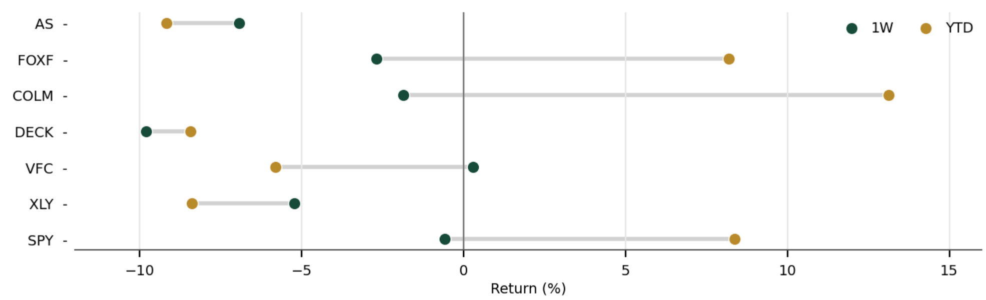
July 27, 2026 | Week 30 (July 20 - July 26, 2026)

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

Key signals (2-3 min read)

Signal	Brief	Source
Product / participation	Dynafit backed Germany's first permanent marked trail-running routes, turning event activation into year-round local infrastructure.	Dynafit; OIC
Sourcing / policy	New U.S. tariff detail weakens Vietnam's relative sourcing advantage, raising concentration risk for footwear and apparel brands.	SGB; U.S. trade
Earnings	Deckers passed $1bn in quarterly sales, but Hoka slowed to 7.7%; KMD raised its FY26 outlook as Oboz returned to growth.	Deckers; KMD
Circularity	The EU unsold apparel and footwear destruction ban took effect; Rieter partners launched a textile-recycling franchise platform.	EU; Rieter

Market - snapshot (weekly + YTD; close July 24, 2026)



Asset	Close	1W	YTD
AS (Amer Sports)	33.92	-6.92%	-9.18%
FOXF (Fox Factory)	18.51	-2.68%	+8.18%
COLM (Columbia)	62.32	-1.86%	+13.12%
DECK (Deckers)	96.04	-9.81%	-8.43%
VFC (VF Corp)	17.03	+0.29%	-5.80%
XLY (Cons. Disc.)	109.41	-5.22%	-8.38%
SPY (S&P; 500)	738.93	-0.59%	+8.36%

Note: 1W = July 17 -> July 24; YTD = Dec 31 -> July 24 (chained). Market data: price aggregation. Returns: Artiga calculations.

Section summary

Week 30 (July 20 - July 26, 2026) - Curation: Artiga Partners

Product & Innovation

Dynafit - permanent routes turn participation into infrastructure. Two permanently marked trail-running routes opened in Oberaudorf, Germany, with Dynafit and SALTY support. The move extends brand activation beyond an event weekend and creates repeatable local use.

Source: Dynafit / SALTY Trailrunning; OIC summary, July 2026.

Recycling Powerhouse - circularity moves toward a repeatable plant model. Rieter, Saentis Textiles and Valvan formed a Swiss franchise platform for certified recycled yarn, with a first blueprint operation planned in Qatar in early 2027.

Source: Rieter media release, July 17, 2026.

Trade & Ecosystem

Vietnam - tariff reset challenges the post-China sourcing winner. New U.S. Section 301 detail appears less favorable to Vietnam than to some competing Asian sourcing markets, increasing landed-cost and concentration risk for footwear and apparel programs.

Source: SGB Executive synthesis, July 27, 2026.

EU unsold goods - destruction ban becomes an operating requirement. Large companies may no longer destroy unsold apparel, clothing accessories or footwear except under defined derogations; medium-sized companies follow in July 2030.

Source: European Commission / ESPR implementation update, July 2026.

Companies & Executives

Salomon - Greater China leadership targets the next growth phase. Vincent Du, a 20-year Nike veteran, was named SVP and GM for Greater China, with a mandate spanning retail expansion, trail running, apparel, Sportstyle and digital.

Source: Salomon announcement / OIC, July 2026.

Uvex - centennial scale highlights durable specialist economics. The German safety and sports group marked 100 years with approximately EUR 683 million in annual sales, 3,000 employees and 49 subsidiaries.

Source: Uvex Group anniversary review / OIC, July 2026.

Earnings, Economy & Markets

Deckers. Q1 FY2027 net sales rose 5.7% to $1.02bn. Hoka grew 7.7% to $703.5m and Ugg 4.9% to $278.0m; the first billion-dollar quarter did not remove concern about Hoka's high-single-digit pace.
Source: Deckers Brands Q1 FY2027 results, July 23, 2026.

KMD Brands. FY26 sales are now expected at NZ$1.040bn-NZ$1.044bn, with underlying EBITDA of NZ$38m-NZ$41m. Kathmandu improved and Oboz returned to year-over-year growth in Q4.
Source: KMD Brands market update / NZX, July 22, 2026.

Fenix Outdoor. Q2 revenue fell 2.8%, with Brands sales down 6.2% to EUR 38.0m. Germany remained weak and price-driven, while the Nordics and improving North American orders were brighter signals.
Source: Fenix Outdoor Q2 2026 report, July 21, 2026.

Thule. Q2 organic sales rose 2.5%; Europe grew 4.3% while North America declined 2.3%. Adjusted operating margin improved to 22.8% as all four product areas grew.
Source: Thule Group Q2 2026 report, July 20, 2026.

Markets. In the Artiga watchlist (close July 24), SPY was -0.59% 1W (+8.36% YTD). DECK fell 9.81% after results and AS declined 6.92%, while VFC was the only positive name at +0.29%.
Source: Market price aggregation; Artiga calculations.

Next dates to watch

Date	Item
Jul 29, 2026	VF Corp - Q1 FY2027 results.
Jul 30, 2026	Columbia Sportswear - Q2 2026 results.
Aug 19-21, 2026	Outdoor Retailer - Minneapolis show.
Aug 31-Sep 2, 2026	Texworld Apparel Sourcing Paris - Le Bourget.

Sources consulted (selection)

SGB Executive | Outdoor Industry Compass | Deckers Brands | KMD Brands / NZX | Fenix Outdoor | Thule Group | European Commission | Rieter | Salomon | Uvex | market price aggregation