

MAGAZINE

OFFICIAL PUBLICATION OF THE WORLD FEDERATION
OF THE SPORTING GOODS INDUSTRY

2018

THE VISIONARIES

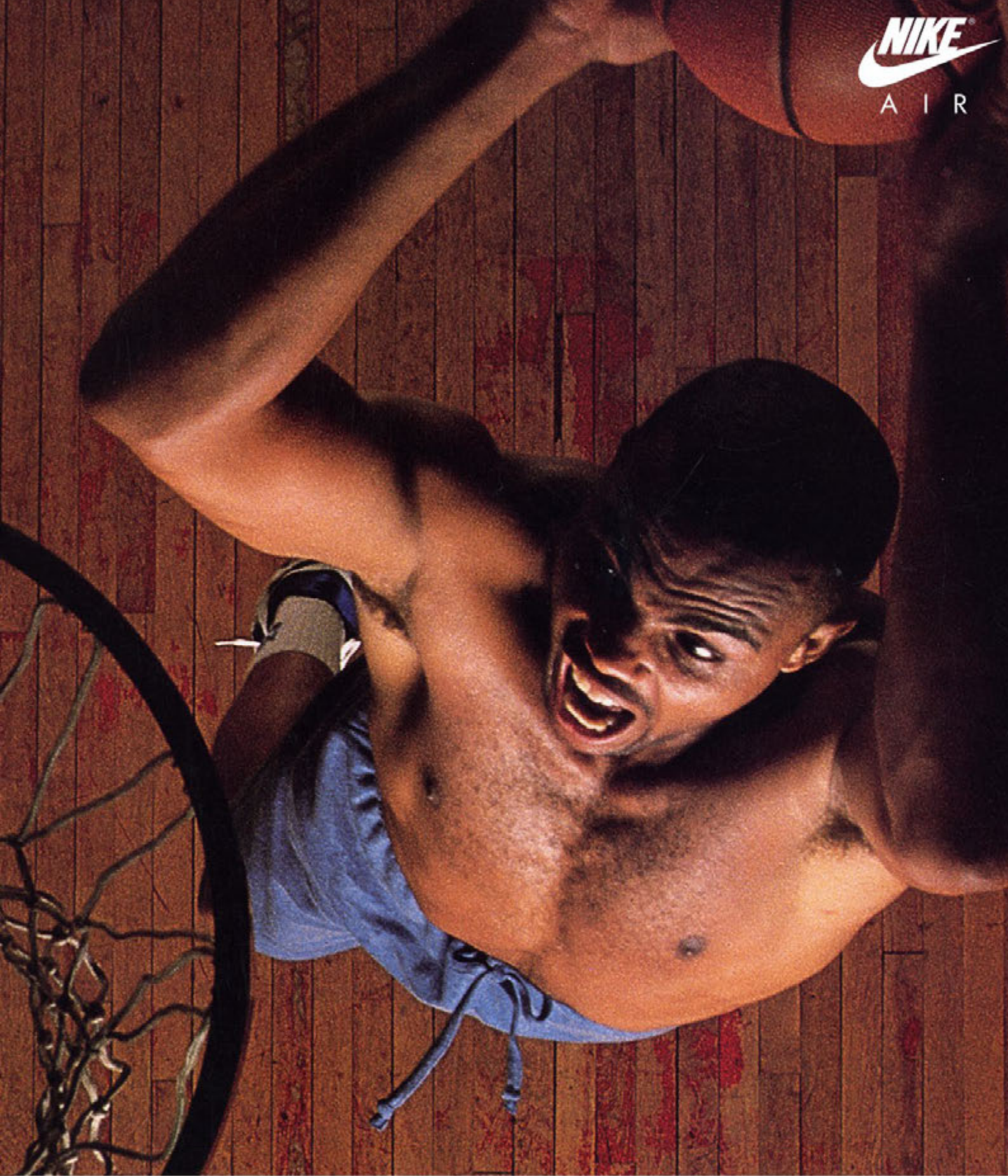
FORWARD THINKING



40 YEARS
JUBILEE EDITION



WORLD FEDERATION OF THE
SPORTING GOODS INDUSTRY



NIKE
AIR

AIR FREIGHT.

The Air Force from Nike. When it positively absolutely has to be in someone's face.



MESSAGE

CHAIRMAN OF THE BOARD

Dear WFSGI members

Dear readers

Looking into our 40th year of WFSGI, we are facing a world full of great geopolitical volatility and challenge, but also of great opportunity for sport to continue to be a unifying force bringing people together. This year, WFSGI starts with a new leadership structure in place, with the title of President shifting to a permanent monicker and the chairmanship of the Board becoming elected on a three-year rotating term. It is my honor to serve as WFSGI's Chair and to continue in a strategic direction solidly in place, but to add new capability and to leverage the strength of our companies to have a stronger voice in the issues impacting our operating environment. Through the leadership of Frank Dassler, and those who have helped lead before him, WFSGI has never been better positioned for the challenges ahead.

With a strong committee system in place, tapping into the skills and talent of our membership and a team of the most capable professional staff in WFSGI's history, we are well prepared and organized to face the uncertainty and to turn it into opportunity. Our structure better positions us to face trade challenges, deliver sustainability improvements, weigh in on digital policy, and to address a myriad of other issues facing the sporting goods industry. Big global events, including the World Cup and the Olympics, are just around the corner. The retail landscape is rapidly evolving from traditional brick and mortar, to a mobile and connected digital marketplace with consumer expectations growing increasingly more demanding. Dot com was once viewed as a disruptive force in retail, but it is now the marketplace. Consumers find products and want to order through mobile devices and expect delivery in shorter cycle times than ever before. To meet these expectations, the way we manufacture, sell, distribute and deliver our products is changing by the day. And innovation will be the driving force to the solutions we deliver.

Our collective brands touch millions of people in millions of ways. Our athletes, employees, customers, professional teams and schools, the venues where we play, our retail partners, supply chain, sourcing base and manufacturing partners create an enormous global presence for the sporting goods industry. While competition is at the heart of sport and what



we do, our collective voice in the world has potential yet to be realized. Successfully cataloging the impact of the sporting goods industry will give us a louder voice and a stronger hand to affect change in the issues we face.

As WFSGI looks ahead, we are committed to delivering the benefits of membership that you expect, yet evolving with our industry and the world where we operate. We must build capability to assure we are connecting with those we touch and with those who impact our business. Our collective impact is enormous and we can leverage our footprint to make positive change in the world. The voice of the sporting goods industry can drive sustainability goals, embrace diversity and continue to unite a divided world through sport.

Thank you for being a part of WFSGI. Working with you and the WFSGI Board, we will leverage our scope, scale and reach to give you a strong return on your membership investment and to raise the voice of the sporting goods industry and fuel the passion for sport.

All the best,

Sean O'Hollaren

WFSGI Chairman of the Board

SUSTAINING MEMBERS

The sustaining membership is a complimentary membership. Companies that choose to be a sustaining member demonstrate a strong identification with the WFSGI and its objectives.

GOLD

adidas



SILVER



BRONZE



THE WFSGI THANKS ALL ITS SUSTAINING MEMBERS FOR THEIR CONFIDENCE AND SUPPORT!

MESSAGE

PRESIDENT AND CEO

Dear WFSGI members
Dear readers

40 years WFSGI!

It is a great pleasure and tremendous honour for me to lead the WFSGI through its 40th anniversary. 40 years of existence mean that there is a real need for associations like ours and I wish to thank our members for their support and trust in the work that we deliver for the industry.

Let me also thank my predecessors for paving the road to the success we enjoy today. Both Pierre Ryser (RIP) and André Gorgemans have been remarkable leaders who dealt actively with the problems of their periods. 10 years ago, I was hired as the third Secretary General and last year you increased your trust in me by giving me the title of President and CEO. Since my start, I had the honour to enjoy your full support, which led to a continued growth until today. The growth and increase is shown in membership, services and activities. Also our operational team grew to 17 people (inside and outside) to deliver the day to day business and services of the WFSGI and I thank every one of them for their hard work.

A short glance back on the year 2017. We had an intense year and many new developments caused different waves in our industry. The challenges around manufacturing, such as shorter lead times, close to market, flexible productions or retail that saw increasing pressure from major e-tailors, their increasing need for own e-commerce platforms and the changing retail service offers. Also the developments around digitalisation are taking a direct influence on our lives and we are not 100 per cent certain where this road is leading us. These are exciting moments, and as the changes come very fast we need to focus to succeed.

New in 2017 was our World Cycling Forum, held in Portugal. The event was a big success and a second edition is planned for March/April 2019. In addition, we have defined the details of collaboration between the WFSGI and IOC and we are moving forward on the first activities. One of them is the NOC Support Programme in PyeongChang 2018 and we already wish to thank the supporting brands for their generous contributions to the programme.



Please allow me to finish by thanking all the people who have been contributing to the success of the last 40 years. Starting from the late Mr. Armin Dassler (1978) as the first Chairman of the General Assembly and Chairman of the "Committee of Nine" to Sean O'Hollaren (2018) as acting WFSGI Chairman of the Board, but also to all the Board and Committee Members who have invested many hours of hard work for the benefit of our industry. I especially wish to thank the current WFSGI Board, Committee Chairpersons, Committee Members and all the people who are today continuously driving the Federation and the industry forward.

I wish our members a happy 40-year anniversary, good health and prosperity for 2018. We look forward to seeing you at one of our next WFSGI meetings.

With best personal regards,

Robbert de Kock
WFSGI President and CEO



CONTENTS

06

Leading in a changing world

08

40 years - The WFSGI story

20

The future of the Olympic Games

22

Physical activity in a changing world

26

Why sustainability pays off

28

The future of urban mobility

30

Quantum leap in bicycle development

34

Cycling and the future of R&D



36

Need for speed decisive for bike sector's future

50

Everybody becomes a retailer

38

Material innovation - The sky is the limit

54

Cutting edge digital brand protection

42

Digital and automated business of the future

56

Digital – The great connector

44

The age of robots and machine intelligence

60

Free trade – Where are we heading?

48

Disruptive change in the footwear industry

64

The WFSGI – Committees, reports, members

LEADING IN A CHANGING WORLD

By Graeme Codrington, Futurist, Author and Speaker on the Future of Work, CEO, TomorrowToday Global



Science fiction writer, futurist and author, Arthur C. Clarke once said, "If by some miracle, a prophet could predict the future, exactly as it was going to take place, his predictions would sound so absurd, so far-fetched that everybody would laugh him to scorn." Sadly, he's right. We can't predict the future, but it's becoming more and more important to scan the horizon for disruptive change anyway. There are five key skills that we all need to add to our workplace toolkit if we're going to survive the turbulent times that lie ahead.

We live at a remarkable moment in human history. The promises of the technological developments of the past few decades are now on the brink of delivering real change in every aspect of our lives, from renewable energy to cures for diseases. We're living longer than any human beings ever have, with more than half of all children born this year set to live past one hundred years in age, due to gene therapies like CRISPR, medical robotics and personalised medicines. New materials, like graphene are about to change the way we build things, and 3D-printing will change manufacturing. Virtual and augmented reality is just taking off, with the imminent arrival of real-time, always-on versions in our glasses or contact lenses. Natural language processing now allows for real-time translation and brings AI into our homes. Driverless cars are just a few months away from being a reality, and probably a mere decade or so from becoming compulsory in some cities and motorways around the world. And, in case that's not enough, there are now serious plans in place to colonise Mars.

In the world of sports, the next few years will see genetic modifications of human beings, robotic assisted athletes, gene and stem cell therapies to help recovery from injury and medications customised to individual DNA. 3D printers will change how we make sports equipment. New e-sports will continue to grow in popularity, and real-time technology added to older sports - initially to aid referee decision-making, but also to enhance the viewers experience from VR to immersive tech.

It can be a bit breathtaking. Even more so when these changes move from interesting hyped-up conversations to real disruption in your own industry and life. There are very few companies

that haven't experienced disruptive change in the past few years; and all of us will experience even more in the next few. Most of this has come in the form of unexpected (and unwanted) competition. Whether its a small startup nibbling at the edges of your business, or some new technology or digital platform that aims to revolutionise the way your industry works, no company is safe from disruption these days.

So, how should we handle this? What is the appropriate leadership response? How do we build adaptability and innovation into the DNA of our businesses so we don't get caught out by the future? There are at least five skills and habits that can help us:

1. Switch on our radars

As Arthur C. Clarke said, no-one has a crystal ball that can show us the future. But right now, all we need to do is look around us at the emerging technologies to gain a glimpse of the future. Think of driverless cars. A few years ago, this felt like a futuristic conversation, with a delivery date sometime in the 2020s. Now, we expect driverless cars legally on some roads during 2018. The technology and legislation are changing faster than anyone could have imagined. It doesn't take a lot to realise that the real value of driverless cars only comes when every car on the roads is driverless. Then every car can communicate with every other car, and between them the cars can create the most efficient and safest traffic pattern right now. We can't predict an exact date countries and cities will start to make driverless cars compulsory, but we can predict it's likely to happen. And then we can think about all the industries that will be affected: insurance, panel beaters, traffic officers, taxi drivers, cyber security experts, construction (because we have to convert all



the parking spaces into something else - we won't need them), regional airlines (because people will drive a few hours rather than fly short distances), and so on.

Switching on our radars means that we take some time out of our work lives to look at the emerging trends, and track the disruptive forces in the world around us. Being surprised is not good for business. Switching on our radars requires us to change what magazines we read, subscribe to some new YouTube channels, watch a TED video a week, follow top thinkers, engineers and futurists on social media, or whatever you feel you need to do to make sure you get out of the bubble of your industry and start looking more at the horizon of change in the world around us.

2. Be more curious

When we look up a bit from our own industries, we also need to become more curious, and ask better questions. Many of us have a model of leadership where the leader is one who has the answers. Your experience, your length of time in the industry, your expertise, all qualify you as the one other people come to for answers. And yet, this is not true today. Many established businesses and leaders are getting into trouble precisely because they are not looking for new ways, for better ways, for unexpected ways to deliver their products and services. In a time of turbulent change it's better to have leaders who have questions that are difficult to answer, rather than leaders who have answers that are difficult to question.

3. Experiment more

This leads to the most important thing leaders can do right now, and that is to create a culture of experimentation in their organisations. Any organisation that does not experiment constantly will not survive the next ten years.

Many leaders focus too much attention on the "big ticket" innovative ideas - big experiments with new products, services or markets. These can be very costly and risky, but they don't develop a culture of experimentation in the business. Instead, we need lots of smaller, easier experiments on the go, all the time. These should be fairly contained, temporary shifts in company policy, systems or procedures that allow us to try out

new ways of working, learn lessons quickly and cheaply, and make small changes regularly. We should experiment with how we run meetings, office layout, communications, office hours, virtual working, dress code, sales techniques, or whatever other ideas your team can come up with. Of course, some of these experiments are not going to work, so we need to learn how to embrace failure (yes, not just "accept" or "tolerate" failure, but actually "embrace" it). There isn't another way to get from where we are today into an unknown future.

4. Listen to different voices

We can't just keep relying on the "old" voices in our industry. We need to listen more to those who maybe haven't had much of a voice in the past. This includes women, minorities and millennials. It includes outsiders to our industry, and looking for what's happening elsewhere. It means looking to other countries and regions, too. It's too easy for those who have been in an industry for a decade or more to be trapped by their experience. And the more successful you've been, the more you're in danger of this happening.

5. Identify limiting orthodoxies

Which leads to the final tool in the future-focused toolkit, and that is the willingness to question your entrenched habits of thinking and action. Industry benchmarks, best practice and standards are the enemy of innovation. We cannot be held back by them, and need to develop a willingness to question the "received wisdom" of our past.

No guarantees

These five tools are deceptively simple. None of them is anything special in and of itself. But together they form the basis of the DNA of the companies that are proving to be innovative, and they are the secret to the success of challenger brands around the world. There are no guarantees, but to be successful in the next ten years, these five skillsets and habits are the best starting point.

Legendary CEO of General Electric, Jack Welch, as he was heading to retirement said, "When the rate of change out there exceeds the rate of change in here, the end is in sight." These five tools will help you and your organisation fire up the engines "inside" your business and make sure you start to move at a speed that will help you match what is going on "outside". This is leadership's most urgent task right now.

THE 40TH ANNIVERSARY OF THE WORLD FEDERATION

By **Peter Thürl**, President TPR Thürl Public Relations and Honorary Member of WFSGI



Over the past 40 years the World Federation of the Sporting Goods Industry (WFSGI) has earned a lot of laurels for the industry, as the "UN of the global sporting goods industry", but has never rested on them. The success based on the global work is highly admired by fellow federations.

With industry and commerce making a global effort in the sense of "Free and Fair Trade", the Federation steadily ascended in the past few decades to become a strong partner of the Olympic Movement. It has become an important partner of the UN and its "Sport for All" promotion, and the European Union and the goal for its sporting citizens to "be active".

The Federation has fulfilled the mission created by its founding fathers, who on September 30, 1978 at 10 o'clock at the SPOGA in Cologne, Germany, spoke this into life. They have not only fulfilled the vision but they have gone above and beyond. The WFSGI is the main partner of all parties concerned when it comes to sports and economics and their joint role in society.

The fundamental constitution of the WFSGI in 1978 consisted of the following "nine statements" and they are still valid today:

1. International standardization of sporting goods, taking into account the issues of safety
2. Worldwide exchange of information in all areas of the sporting goods industry
3. Defining standards for the product liability
4. Coordination of dates & places of international trade fairs in the sporting goods industry
5. Exchange of product information, know-how & development aid
6. Promote the development of grassroots programs, youth sports & the international coordination of elite sports
7. Promotion of free & fair global trade
8. Cooperation with international sports associations in all issues of mutual interest, particularly in relation to amateur & professional sports
9. Cooperation with national & international economic organizations



"We are creating a federation," said the former Head of Puma, Armin A. Dassler, "In order to give the industry a powerful tool with which they can express their opinion towards international organisations."



The founders of the WFSGI wanted to convene a world conference of the sporting goods industry as early as 1976, which, as Henri Rossolin said, "should be a gain for all sporting goods manufacturers around the world. It could provide marketing information to improve the distribution of the products and the exchange of information could help reduce dumping measures that reduce the profits of both foreign and domestic manufacturers."





Old newspaper article provided by Henri Rossolin

THE FOUNDATION

In February 1976, Henri Rossollin, President of FIFAS (Fédération Française des Industries du Sport et des Loisirs), and Howard Bruns, President of SGMA (Sporting Goods Manufacturers Association), met at the NSGA Show (National Sporting Goods Association) in Chicago and exchanged ideas about an international cooperation in the sporting goods industry. In fall of 1976, John Vermeulen, President of European Sporting Goods Manufacturers, organized the first World Congress of the Sporting Goods Industry.

In spring 1977, in Chicago, a Committee of Five was constituted representing Hong Kong, Japan, USA, India and Europe. In spring 1978, this Committee was enlarged to a Committee of Nine with the following members: Armin A. Dassler (Germany), A.D. Bhutta (Pakistan), Howard J. Bruns (USA), D.N. Budhraj (India), Chiun Yin Kao (Taiwan), Heinz Koch (Canada), Henri Rossollin (France), John Vermeulen (Netherlands) and Hideo Matsu-Ura (Japan).

In November 1978, the first Board was constituted under the Chairmanship of David Sealy (UK).

Howard Bruns said: "Lack of or contradictory information about the global sporting goods market is affecting retailers, consumers and manufacturers. Products that are poor or below standard, products that are out of stock, and clothes that do not meet the requirements may result in unsaleable inventory and customer dissatisfaction, provided these factors are not eliminated. These issues need to be resolved before they cause untold damage to the entire industry."



>

In the past decades, the history of the World Federation has repeatedly been the subject of detailed representations, especially on the anniversary of the 25th jubilee of the WFSGI in 2003. Anniversaries are always "long-term reminders", as the writer Hermann Lahm put it.

Nevertheless, on the occasion of the 40th anniversary of the founding of the Federation, one must once again take a look at the most important founding fathers, who gave their sporting goods DNA to the Federation that initially shaped the fundamental principles and paved the way to a successful Federation. It was launched in Cologne in 1978 by 80 representatives from 24 countries. Even at that time, the World Federation included national sporting goods industry associations from 17 countries.

Howard J. Bruns, President of the SGMA (today SFIA) in the USA, and his friend, Henri Rossolin, President of FIFA in France, took the first steps towards founding a federation as early as spring 1976. Through this initiative, representing major manufacturers of sporting goods, they opened up the long-running development of a monopoly, especially involving German, Japanese and Taiwanese manufacturers of elite athletes' equipment.

The World Federation owes its very existence to a small group of men who, with imagination and unbelievable persistence, conceived and implemented a dream.

>

John A. Vermeulen, a Dutch entrepreneur, the unforgettable long-time president of FESI and the father of the European Sporting Goods Standard, joined the two colleagues in 1976 and commented: "The future World Federation should speak with one voice at all international conferences and meetings in which the interests of the sporting goods industry needs representation, speaking for the whole sporting goods industry in the world."



ISPO and the WFSGI have been inseparably linked in the past and by way of tradition, the Federation's Annual Meetings have been held in Munich since 1986. The two ISPO bosses during this period, Dr Werner Marzin and Manfred Wutzlhofer, provided the framework for two big visits by the President of the IOC in 1985 and 1986. The picture shows IOC President Juan Antonio Samaranch (middle) visiting ISPO with Gib Ford, CEO of Champion, (left) and J. Lohrberg (right).





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WFSGI representatives visit IOC President Juan Antonio Samaranch, 1987.



© 1992 / Comité International Olympique (CIO)

A delegation of the WFSGI visits IOC President Juan Antonio Samaranch, 1992. In the first row, WFSGI President Kihachiro Onitsuka (left), IOC President Juan Antonio Samaranch (middle) and Masato Mizuno (right).



© 1999 / Comité International Olympique (CIO) / Locatelli, Giulio

Speech by Richard Kazmeier, WFSGI President at the World Conference on Doping in Sport, Lausanne, 1999.



© 2002 / Comité International Olympique (CIO) / Maeder, Jean-Paul

Stephen Rubin, WFSGI President, opens the World Sports Forum at the Olympic Museum in Lausanne, 2002.



© 2012 / Comité International Olympique (CIO) / Julliard, Richard

Meeting between IOC President Jacques Rogge, WFSGI President Motoi Oyama and Stephen Rubin, Honorary WFSGI President, London 2012.



© 2016 / Comité International Olympique (CIO) / Moratal, Christophe

Signature of the Memorandum of Cooperation between the IOC and the WFSGI at the Olympic Museum in Lausanne, 2016.

BSI Vice President and Puma CEO Armin A. Dassler was also one of the founding fathers. He put his work for the association under his motto: "We must continue our efforts to convince the world that every item produced and sold by the sporting goods industry to the consumer helps threefold: to show profit, to give work to our employees, to improve the health of the people. Every dollar we make is a healthy dollar."



>

You may ask: Why do we need a World Federation? There are associations for manufacturers, retailers and for special interest groups throughout the world. In a single word the answer is: unity. Yes, worldwide unity for the sporting goods industry. A unity of all industry segments that can address questions of common interest with one voice. The World Federation is the only body capable of filling this need.

In this age of big government, global conglomerates, worldwide markets and gigantic sports events the industry must be able to speak with one voice - or take the risk of not being heard at all.

The WFSGI has an unique structure with equal partnerships between Asia/Oceania, Europe/Africa and the Americas. This unique structure whereby the large share power with the small, whereby the industrial nations share with the developing nations, is a supreme achievement. Deserving special support and recognition. This is not a 'comfortable club' with special interest groups huddled in the back room and making deals

without consultation. It is an open democratic forum and the legitimate representative of all sports associations and companies throughout the world.

With the first Secretary General, the Swiss Pierre Ryser, the founding fathers had made this man one of their own. Without his diplomatic and technical skills and executed multilingualism the worldwide "sporting goods UN" would not have progressed as quickly as it did in its founding years. He is, therefore, rightly one of the men of the first hour who, with great visions and warm hearts, created a federation which on its 40th birthday today, achieved its outstanding place in international trade and in the sporting goods industry.

It will be interesting to see if there will be a WFSGI Hall of Fame in Bern at the next big jubilee. The Federation and the industry would certainly deserve it.

Kihachiro Onsitsuka, a man who launched forth the Japanese sporting goods industry and his own company after the war, when he provided the 1956 Olympic Marathon champion, Abe Bibila, who was running barefoot, with his first pair of running shoes, said: „The members of the WFSGI are competing with each other. We are competing in the market sometimes in a friendly, sometimes in a fierce way. We share all kinds of problems, some very important some less important. We meet twice a year and discuss those problems with sincerity and mutual trust on the ground of a universal ideal to promote sports for peace and happiness of mankind. I am convinced that any problem can be settled.“



Vice-President Peter Martin said already at WFSGI Meetings in Tokyo, 1985: "No other organisation offers such a wide window to the world as the WFSGI, or the possibility of such extensive contact to industry and affiliated sport organisations."

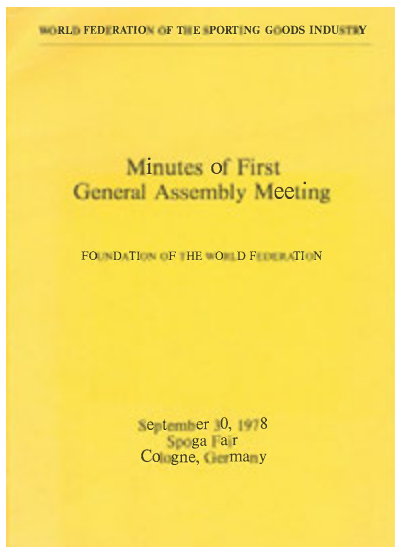




From left to right: Howard Bruns, Henri Rossolin, Masato Mizuno and Jimmy Easton, 1988.



Armin Dassler (centre), Masato Mizuno (left) and Peter Thuerl (right).



Secretary General Pierre Ryser announced the foundation of the WFSGI to the trade magazine Eurosport & Freizeitmode for Saturday, 30 September 1978 in Cologne, Germany.



From left to right: Pierre Ryser, Hajime Onoda and Kihachiro Onitsuka at WFSGI Meetings, 1990.



From left to right: Masato Mizuno, Andre Gorgemans and Keith Heyes at WFSGI Meetings in Japan, 1992.



G.S. Gill informs former German Minister for Environmental Affairs Angela Merkel, today's Chancellor of the Federal Democratic Republic of Germany, about ASPO Trade Show, Kuala Lumpur, Malaysia, 1995.



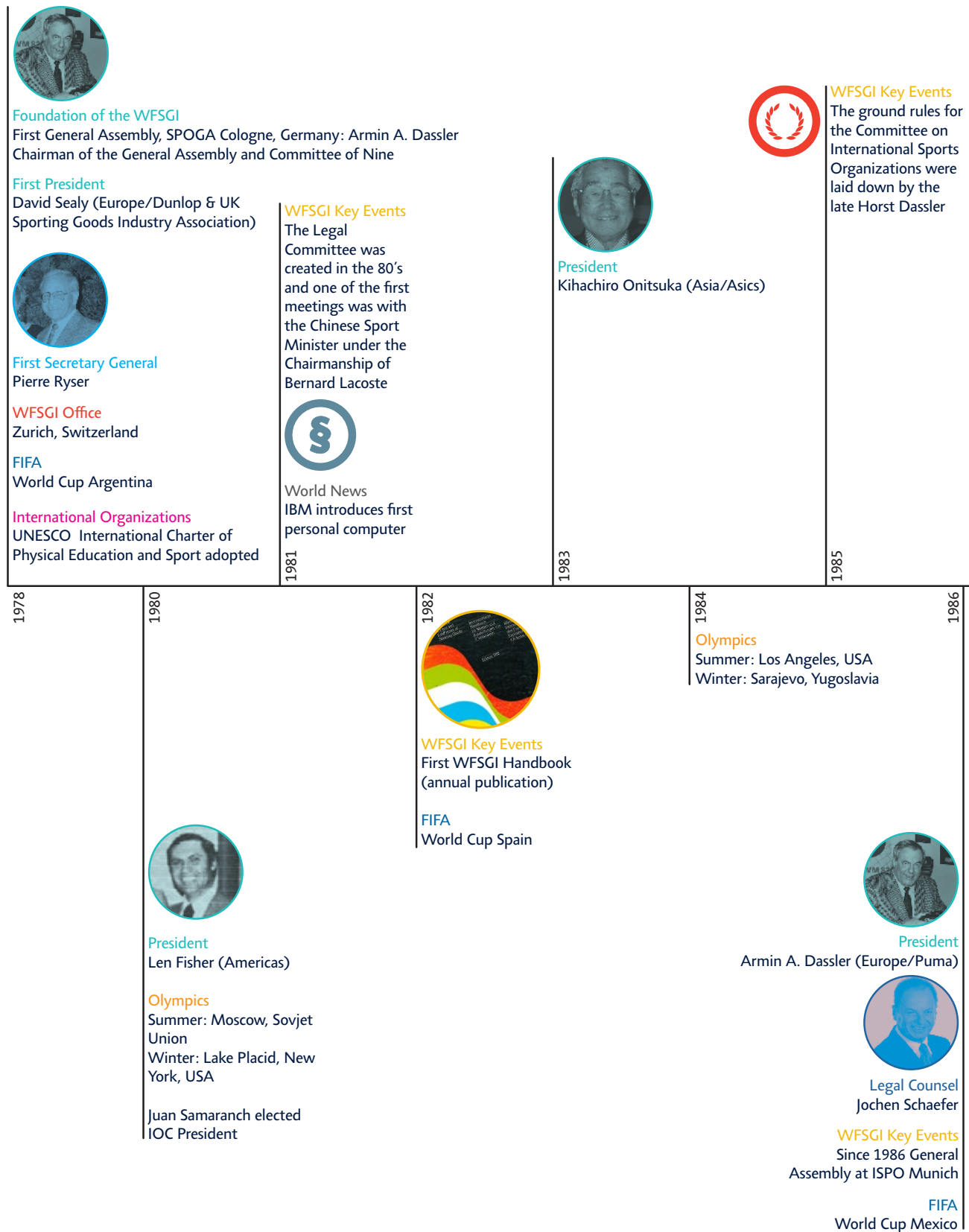
WTO DG Pascal Lamy at the WFSGI General Assembly, 2011 (from left to right: Outgoing President John Larsen, Pascal Lamy, Motoi Oyama, and Secretary General Robbert de Kock).

The most important reason for us is in my opinion the simple fact that we are developing an organization, where we can meet, where an American manufacturer can speak with a colleague from India and where a Japanese sporting goods manufacturer can exchange his thoughts with one from Europe. We all have common problems. We all produce something for the same market. We all need human assistance, we need machines, we sell to the same dealers, we have our troubles with our or our competitors' promotion, with amateurs or professionals. Someway or the other we are in contact with Sports Federations, with Olympic Games or with World Championships. This World Federation is the place to meet and to discuss these problems. It is the place where we must stick together, where one manufacturer must help the other if he wants the other one to help him. It is here, where we must forget our competition and be aware that everyone of us wants to live, that all of us have responsibility towards thousands of people who work for us, who have put their fortune in our hands.

Excerpt of the welcome speech of Armin A. Dassler, Chairman of the Committee of Nine (and the first General Assembly) held on September 30, 1978.



Dick Kazmaier and Hajime Onoda on sports retail tour in Kanda, Tokyo.





WFSGI Key Events
WFSGI News Bulletin
launched (until 2000)

Olympics
Summer: Seoul, South
Korea
Winter: Calgary, Canada

Sport Technology
Goal line video review
introduced in ice hockey

Introduction of carbon
fibre skis and snowboards

WFSGI Office
Fribourg, Switzerland

WFSGI Key Events
UNESCO/WFSGI
partnership started

WFSGI invited to
inaugurate the first ever
sporting goods fair in
Xian, China

Sport Technology
Introduction of goal line
technology in hockey and
football

1987



President
Keith Heyes
(Americas/Mitre Sports)

World News
The fall of the Berlin Wall
Start of commercial use of the
Internet

1989

1990

FIFA
World Cup Italy



President
Kihachiro Onitsuka
(Asia/Asics)



Secretary General
André Gorgemans

WFSGI Key Events
The IOC officially acknowledges and
recognizes the WFSGI as an official
association

Eco-Wave Newsletter

Start of the Environment
Committee with Masatu Mizuno
as Chairman



1992

WFSGI Key Events
WHO/WFSGI
partnership started

ILO/WFSGI
partnership started

Olympics
Winter: Lillehammer,
Norway

FIFA
World Cup USA

Sport Technology
Introduction of in-helmet
headsets for American
football

1994

WFSGI Key Events

The WFSGI "Drug Clause" - The late
Horst Dassler, son of Adi Dassler, had
the vision to create sanctions for
athletes who took forbidden
substances in terms of terminating
their sponsorship and endorsement
contracts

Olympics

Summer: Barcelona, Spain Winter:
Albertville, France

The last time Winter and Summer
Olympics take place in one year

First WFSGI participation at the
Olympic Games

WFSGI Key Events
Conference on Human Rights:
The Way Forward, Verbier,
Switzerland

The outcome book The Way
Forward gave guidance to the
new Committee on Ethics and
Fair Trade created by Stephen
Rubin

UNICEF/WFSGI
partnership started

FIFA/WFSGI
partnership started quality
certification program for
footballs along technical rules
and regulations issued by FIFA

WFSGI invited to participate in
the annual WHO meeting on
the benefits of physical activity

WFSGI Office
Verbier, Switzerland



President
Stephen Rubin
(Europe/Pentland)

International Organizations
World Trade Organization (WTO)
founded

World News
Internet electronically
connects the globe

1995



WFSGI Key Events
First World Sports Forum
in St. Moritz, Switzerland
- First sports conference
with the presence of the
IOC, International Sports
Federations, NGO's and
the sport industry

Visiting Sialkot, Pakistan,
with Indian football
manufacturers to witness
the auditing scheme of
child labour put in place
by the ILO for WFSGI

Olympics
Winter: Nagano Japan

FIFA
World Cup France



President
Dick Kazmaier
(Americas/SGMA)

1998

WFSGI Key Events
Atlanta Agreement signed with
ILO to eliminate child labour

Child Labor Initiative wins
Business Ethics Award for
Corporate Social Responsibility

World Sports Forum founded
as a non profit association to
host regular international
conferences

First Honorary President
Kihachiro Onitsuka

Olympics
Summer: Atlanta, USA

1996

1997

World News
Kyoto Protocol

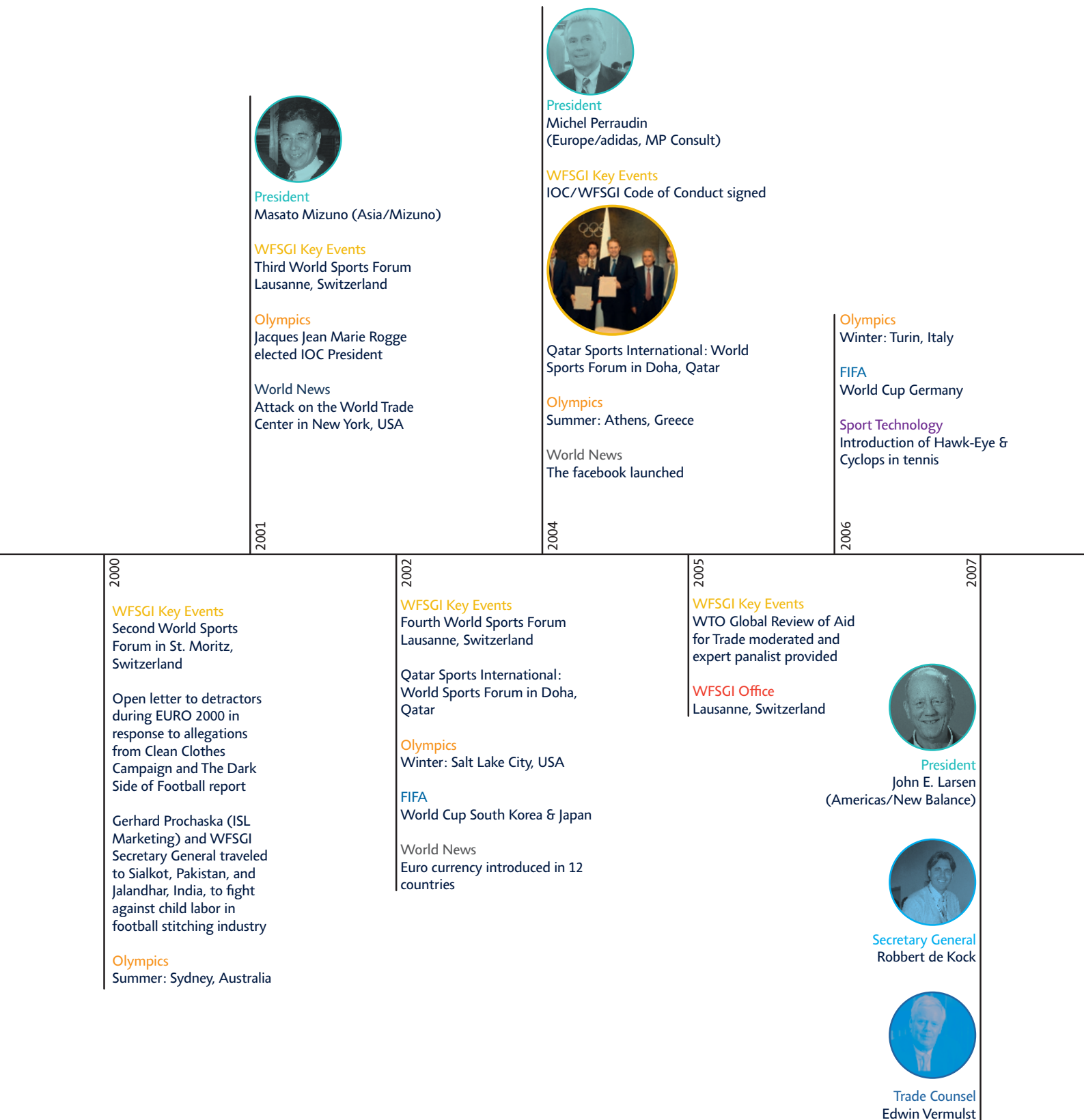
WFSGI Key Events
First IOC/WFSGI Sporting
Goods Industry Marketing
Code signed



President
Stephen Rubin
(Europe/Pentland)

International Organizations
World Anti-Doping Agency
(WADA) founded

1999



THE WFSGI STORY - TIMELINE 40 YEARS

WFSGI Key Events

First WFSGI Manufacturers Forum, Munich, Germany



Trade Committee created

Olympics

Summer: Beijing, China

Sport Technology

Introduction LZR swimsuits

World News

Global financial crisis

2008

WFSGI Key Events

WTO Public Forum Session:
Increasing Public Access to Sport
Through More Open Markets for
Sporting Goods

WTO DG Pascal Lamy speaks at the
General Assembly: A New Look at
Trade in a Globalized World

Intervention at UN Civil Society
Hearing on Prevention and Control of
NCDs to promote Physical Activity,
New York, USA

Manufacturers Forum renamed
Manufacturers Committee responsible
for The Manufacturers Forum

Fourth WFSGI
Manufacturers Forum, Taipei, Taiwan

Bicycle industry joins

WFSGI Office
Ostermundigen/Bern, Switzerland



President

Motoi Oyama (Asia/Asics)



2011



WFSGI Key Events

First WFSGI World
Manufacturers Forum: The
Future of Manufacturing,
Taipei, Taiwan



Physical Activity Committee
founded at ISPO Munich

World Health Assembly
endorsed Global Action Plan
for the pervention and control
of NCDs 2013-2020

Participation at World
Conference of Sports Ministers,
MINEPS V, Berlin, Germany

High level meeting between
WFSGI Delegation and WHO
DG Dr Margaret Chen

Olympics

Thomas Bach elected
IOC President

2013

2009

WFSGI Key Events

Second WFSGI
Manufacturers Forum,
Taipei, Taiwan

2010

FIFA

World Cup South Africa

Olympics

Winter: Vancouver, Canada
First Youth Olympics
Summer: Singapore

WFSGI Key Events

Third WFSGI
Manufacturers Forum,
Taipei, Taiwan

2012

Sporting Highlights

Concussion helmets in baseball
introduced

Olympics

Summer: London, UK
First Youth Olympics
Winter: Innsbruck, Austria

WFSGI Key Events

Health Symposium at ISPO Munich:
Sporting Goods Industry & Public
Health: A Mutually Beneficial
Relationship?

Fifth WFSGI Manufacturers Forum,
Taipei, Taiwan

CR Heads-Up introduced

2014



President

Frank A. Dassler (Europe/adidas)

WFSGI Key Events

World Sports Forum: IPR & Online Brand
Abuse, CSR Supply Chain Management,
Sport as a Tool for Development & Peace

Second WFSGI World Manufacturers Forum:
How Can Design and Manufacturing
Embrace? Leipzig, Germany

WTO Public Forum Session: How Trade
Obstacles and Protectionism Impact
Value-Generation for Countries/Societies

Cycling industry representation at UCI
Equipment Commission

Memorandum of Understanding with FIS &
FESI to promote snow sport activity for
children

Trade Heads-Up introduced

Olympics

Winter: Sochi, Russia
Youth Olympics Summer: Nanjing, China

FIFA

World Cup Brazil



World News

United Nations Climate Change Conference (COP21)
Paris, France, first-ever universal, legally binding global
climate deal adopted by 195 countries

WFSGI Key Events

WTO Public Forum Session: Why Rules of Origin
Matter

World Sports Forum: Entering & Exploring New
Markets

Aquatics Committee founded in London, UK

Third World Manufacturers Forum: Beyond Lean
Manufacturing, Hong Kong

WFSGI only private sector representative at the Fifth
Global Review of Aid For Trade: Reducing Trade Costs
for Inclusive, Sustainable Growth

International Organizations

Revision of UNESCO International Charter of Physical
Education, Physical Activity and Sport

2015

New Management Structure
Secretary General becomes
President and CEO, President
becomes Chairman of the Board

WFSGI Key Events

Fifth WFSGI World Manufacturers
Forum: Moving on to a Digital &
Automated Business of the
Future, Munich, Germany

First World Cycling Forum:
Consumer Centricity & Increasing
Speed to Market, Porto, Portugal

Participation World Conference of
Sports Ministers, MINEPS VI,
Kazan, Russia



New Chairman of the Board
Sean O'Hollaren
(Americas/Nike, Inc.)



New President and CEO
Robbert de Kock



WTO Public Forum Session: Trade
Behind the Scenes: A Sporting
Goods Industry Perspective

World Sports Forum:
Future of Sports Retailing

2017

2016

WFSGI Key Events

Fourth World Manufacturers Forum:
High-Tech Innovation, Digitalization &
Robotics, Taichung, Taiwan

WTO Public Forum Session: Inclusive Trade in
Global Sporting Goods Industry

World Sports Forum: Sustainability, Ethics &
Human Rights

Responsible Sports Initiative (RSI) launched

13 Position Papers on a range of corporate
responsibility topics

Sporting Chance Principles endorsed

First IOC WFSGI NOC Uniform Support
Programme Summer Olympic Games Rio

Memorandum of Cooperation between the
IOC and WFSGI renewed

Olympics

Summer: Rio de Janeiro, Brazil
Youth Olympics Winter: Lillehammer,
Norway

World News
Brexit



2018

Olympics

Winter: PyeongChang, South Korea
Youth Olympics
Summer: Buenos Aires, Argentina

WFSGI Key Events

IOC WFSGI NOC Uniform Support
Programme Winter Olympic Games
PyeongChang

FIFA

World Cup Russia

40 years of WFSGI



THE FUTURE OF THE OLYMPIC GAMES

By **Thomas Bach**, President, International Olympic Committee (IOC)



©2015 IOC David Burnett

The sporting goods industry can look back with pride on being an important part of so many iconic moments, new records and unforgettable sporting achievements in Olympic history. But as in sports, it is always more important to look to the future instead of resting on the success of the past. Building on its strong partnership with the WFSGI, the IOC looks ahead at how we can keep the Olympic Games attractive and relevant for the future.

Let me extend my heartfelt congratulations as the World Federation of the Sporting Goods Industry (WFSGI) celebrates its 40-year anniversary. The International Olympic Committee is proud to have partnered with the WFSGI for much of this time.

Your anniversary is therefore an important milestone and an opportunity to look back on what has been achieved. One highlight of our partnership certainly was the Uniform Support Programme at the Olympic Games Rio 2016. Thanks to the support of WFSGI, athletes from 69 NOCs in need were provided with free competition clothing for the Games, in a great example of solidarity. The Programme was so successful, that we are extending it jointly for the upcoming Olympic Winter Games PyeongChang 2018.

As you celebrate your 40th anniversary, the sporting goods industry can look back with pride on being an important part of so many iconic moments, new records and unforgettable sporting achievements in Olympic history. Your great contribution and support make the incredible performance of the athletes possible. But as in sports, it is always more important to look to the future instead of resting on the success of the past.

Ever since our cooperation with the WFSGI began in 1997, our partnership has always had a strong focus on enhancing the

IOC President Thomas Bach and WFSGI President Frank A. Dassler sign the Memorandum of Cooperation between the IOC and the WFSGI in 2016 at the Olympic Museum in Lausanne.



© 1997 IOC/Loratelli, Giulio

IOC President Juan Antonio Samaranch and WFSGI President Stephen Rubin sign the Olympic Marketing Code between the IOC and the WFSGI in 1997 in Lausanne.



© 2004 IOC/Romeu, Stéphane

Signature of the IOC/WFSGI Code of Conduct in 2004 in Lausanne: Chief of IOC President's Executive Office, Christophe De Kepper, Masato Mizuno, IOC President Jacques Rogge, Michel Perraudin and IOC Olympic Games Executive Director, Gilbert Felli.



© 2016 IOC/Moratal, Christophe



© 2014 / Xinhua News Agency / Li, Xiang

Nanjing 2014 YOG, Athletics, 400m Women - Final, Jessica Thornton (AUS) 1st shakes hands with Salwa Naser (BRN) 2nd after the competition.

image of the Olympic Games, and on promoting the development of sport and the welfare of athletes across the globe. More recently, our partnership has been guided by the recommendations of Olympic Agenda 2020, the strategic roadmap for the future of the Olympic Movement. With the Olympic Agenda 2020 and its three pillars of credibility, sustainability and youth, we have an even stronger foundation to take our partnership to the future. At the heart of this lies our shared belief in the unique power of sport to make the world a better place.

As we look to the future, we must always remember that the success of the Olympic Movement depends on the continued success of the Olympic Games. With Olympic Agenda 2020, we are on the right track to keep the Olympic Games attractive and relevant for the future. This is why we undertook the most comprehensive reform of the Olympic programme in our recent history. As a result, PyeongChang 2018 will see a record number of female athletes at the Olympic Winter Games, while the Olympic Games Tokyo 2020 will have the highest-ever representation of female athletes in Olympic history, in addition to being more youthful and more urban. Already for the Youth Olympic Games Buenos Aires 2018, we will have the first sports programme with complete gender equality, a 50-50 balance, with the same number of girls and boys competing in the same number of sports and events.

Olympic Agenda 2020 also commits us to make the Olympic Games more feasible and more sustainable. Paris and Los Angeles, the Host Cities for the Olympic Games 2024 and 2028 respectively, are both leading the way in this regard. Both cities have embraced Olympic Agenda 2020 in a great way. We see this especially by the record number of existing and temporary

Lillehammer 2016 Winter YOG, Cross country skiing, free Women - Final, Moa Lundgren (SWE) 1st and Johanna Hagstroem (SWE) 2nd are congratulating each other. On the right, Martine Engebretsen (NOR).

facilities that are planned. This is something we have not seen in this dimension in the history of the Olympic Games. These examples will lead to significant cost reductions in the organisation of future Olympic Games.

We know that the future success of the Olympic Games rests on our credibility and integrity. With Olympic Agenda 2020, we have underlined our commitment to strengthen the integrity of sport. For this reason, the IOC has already implemented all good governance measures called for under Olympic Agenda 2020 and we expect other sport organisations to follow this lead. Protecting the clean athletes is another key commitment. In this respect, we have made many proposals on how to reform the worldwide anti-doping system, with the aim to strengthen the role of the World Anti-Doping Agency and making it more efficient.

Everything we do ultimately depends on the global appeal of the Olympic Games. This is why we are so grateful to our partners, like the WFSGI, who are on our side to promote the development of sport and the welfare of athletes. In our interconnected world, we know that we can shape the future of sport only in cooperation with our partners and stakeholders.

In this spirit of partnership, let me wish everyone at the World Federation of the Sporting Goods Industry all the best for the next 40 years and beyond. The IOC looks forward to deepening our cooperation to preserve the integrity and uniqueness of the Olympic Games.



© 2016 / Comité International Olympique (CIO) / RUTAR, Ubald

PHYSICAL ACTIVITY IN A CHANGING WORLD

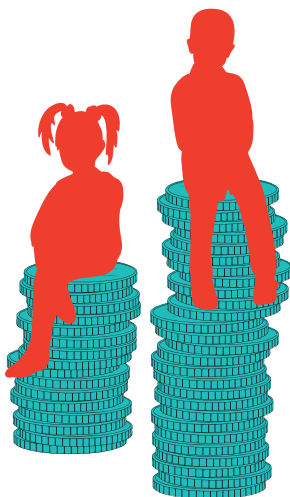
By **Vanessa Garcia Brito**, Senior Director Communications & Partnerships, Global Community Impact, Nike, Inc. & Chair, WFSGI PA Committee



The pace and intensity of global change continues to accelerate at an unprecedented rate, but physical activity is not keeping pace. The WFSGI Physical Activity (PA) Committee understands that physical activity is critical for vibrant, healthy communities and the future of our children – the WFSGI PA Committee is committed to creating a more active world.

This generation is the least active in history, with the World Health Organization (WHO) reporting that over 80 per cent of the world's 11-17 year olds fail to meet the minimum requirements of activity. In addition, physical inactivity is having significant economic impact, costing our global economy between \$67 - \$145 billion per year in healthcare and lost productivity.¹

Physical inactivity economic impact: \$67 to \$145 billion per year.



80% fail to meet world's minimum requirements of activity.

The benefits of physical activity compound over a lifetime, so it is particularly important for children to be active. Active children are healthier, happier and do better in school.² As many behavioural habits are formed at an early age, if children enjoy being active when they are young, they are more likely to retain these good habits and be active for life.³ Physical activity is a formative part of a kid's development and learning. It is key to incorporate quality physical activity into every kid's school experience, before, during and after school. Ensuring the next

Building on a long-standing relationship with Tufts University, New Balance Foundation and Active School Acceleration Project (ASAP) have now teamed up to get kids moving in schools across the country, collectively walking or running a billion miles.



1. WFSGI Physical Activity Committee Position Paper 2017

2. Bailey, R. (2016) 'Sport, physical activity and educational achievement – towards an explanatory model' Sport in Society, DOI: 10.1080/17430437.2016.1207756

3. Okely, A.D., Booth, M.L., and Patterson, J.W. (2001) Relationship of physical activity to fundamental movement skills among adolescents. Medicine and Science in Sports and Exercise, 33 (11):1899-1904.



WHO estimates 360,000 drowning deaths per year. Speedo Swim Generation is working directly with partners to initiate, support or amplify their work to reduce the number of deaths due to drowning. Being safe in and around the water enables individuals to live a healthy and happy active lifestyle.

generation gets moving is, therefore, critical to reversing the current trends and tackling the inactivity crisis.

The WFSGI PA Committee understands that physical inactivity is a whole of society problem, and as a result, requires engagement of, and contributions from, all segments of society. The complex web of determinants of physical inactivity makes it impossible for any one sector to drive progress alone. Looking to the future, the WFSGI PA committee framed a vision for action in its 2017 Position Paper - leading with two key commitments:

1. Raise awareness of the benefits of physical activity and sport
2. Increase levels of physical activity and sport participation, especially among children.

The committee leadership and its members are already hard at work at following through on these commitments. Committee members are exploring opportunities for collective advocacy that leverages the power of the WFSGI global platform, while supporting hundreds of initiatives globally through individual member programs. In an effort to share knowledge and improve the collective impact of individual company initiatives aimed at increasing levels of physical activity, members have developed and shared case studies on PA initiatives in Brazil, South Africa, Bangladesh, Japan, USA, Cambodia, UK, Japan and other countries around the world, providing learnings that may be adapted by the WHO and others to promote health and physical activity. Additionally, to raise awareness of the benefits of physical

Brazil's kids are the least active in Latin America. To help change that, Nike partnered with the City of Rio, community leaders and other partners to get Rio's youth active by bringing play and sport into the city's 22 Olympic Villages – sport and recreation centers that are at the heart of their communities.



Mizuno has developed Hexathlon, a program that combines an athletic ability test with playful activities in which even children with poor athletic ability can have fun learning the basic sports actions such as running, throwing, and jumping adapted to their individual athletic ability.



activity, the Committee's leadership is exploring advocacy and communications campaigns to inform and inspire action.

We believe that the sporting goods industry has a unique role to play in creating a more active world. Collectively, we have massive reach. We touch billions of people with our products, communications and our brands. We offer hundreds of thousands of employees around the world the opportunity to engage in active, healthy lifestyles. We leverage the passion and energy of our employees and our brands to inspire active lifestyles. We have expertise and a strong track record in creating opportunities and experiences that showcase the power of sport on a global stage. Together and in our individual companies, we bring to life the joy of sport and unlimited potential associated with active lifestyles. We have an opportunity to help reverse the physical inactivity epidemic and we hope others will join us.

Started as restoration of the schools/communities affected by the Great East Japan Earthquake, a series of volleyball coaching clinics by Asics at leading high schools were held by ex-national representative players.



BOKS, an initiative of the Reebok Foundation, is an excellent example of a multi-sectoral partnership model between the private sector, local schools and school districts, municipal governments, non-profits, philanthropic institutions, government agencies and initiatives, sport leagues, fitness partners, and academic Institutions.

A photograph of a blue ocean with a white-capped wave in the background. A thin, green thread is stretched across the water, starting from the left edge and ending near the wave. The thread has a slightly wavy, organic appearance.

WE ARE WORKING WITH PARLEY TO PREVENT PLASTIC ENTERING
OUR OCEANS AND TRANSFORM IT INTO HIGH PERFORMANCE SPORTSWEAR.
SPINNING THE PROBLEM INTO A SOLUTION. THE THREAT INTO A THREAD.

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WHY SUSTAINABILITY PAYS OFF

By **Dieter Niewierrra**, Director Communications, oekom research AG



Investors are increasingly using environmental, social and governance aspects within their investment decisions in order to actively contribute towards a more sustainable world. However, this also requires sustainable companies in which they could invest in. For companies it is therefore important to understand that enhanced sustainable corporate management is not only beneficial to their business but also raises their investor attractiveness.

So the question is: How do companies consider the importance of sustainability and how is their corporate management influenced by the responsible capital market? To answer this, oekom research, one of the world's leading independent sustainability rating agencies and research firm conducted an empirical analysis in the summer of 2017. A total of 3,660 companies worldwide were contacted and almost 500 companies participated.

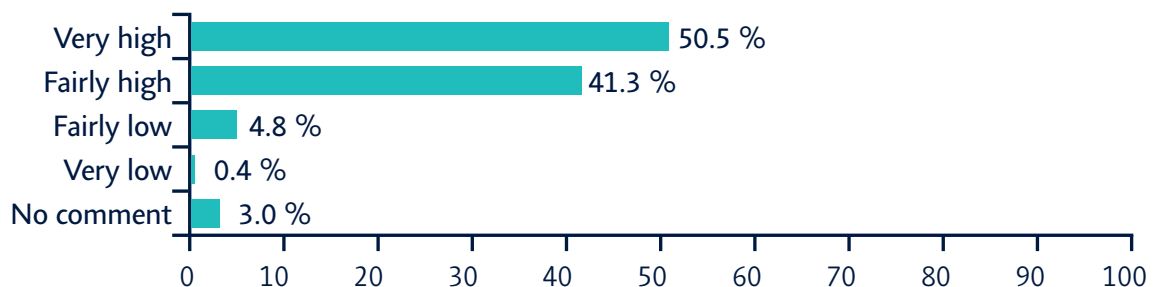
The general relevance of sustainability

There is little doubt about the general importance of sustainable development. The need for resource-sensitive business operations, an intact natural environment and a socially-just society are undisputed and are, overall, also seen as the basis for a general successful business growth. It is therefore not a

surprise that over half of all the polled companies (50.5 per cent) said that sustainability plays a "Very important" role in their own development, and 41.3 per cent declared it to be "Fairly important". Consequently, almost all the polled companies agree on the impact and generally positive message sent by a good sustainability rating.

When it comes to the aforementioned investor attractiveness aspect, the companies also clearly endorse the question of the importance of being included as constituents of sustainability funds and sustainability indices. A total of over 78 per cent regard such listings as important. They appreciate being considered by sustainably active financial service providers and institutional investors for inclusion in mutual and special funds, and asset-management mandates.

Which degree of importance does your company attach to the topic of "Sustainability" for your future corporate development?



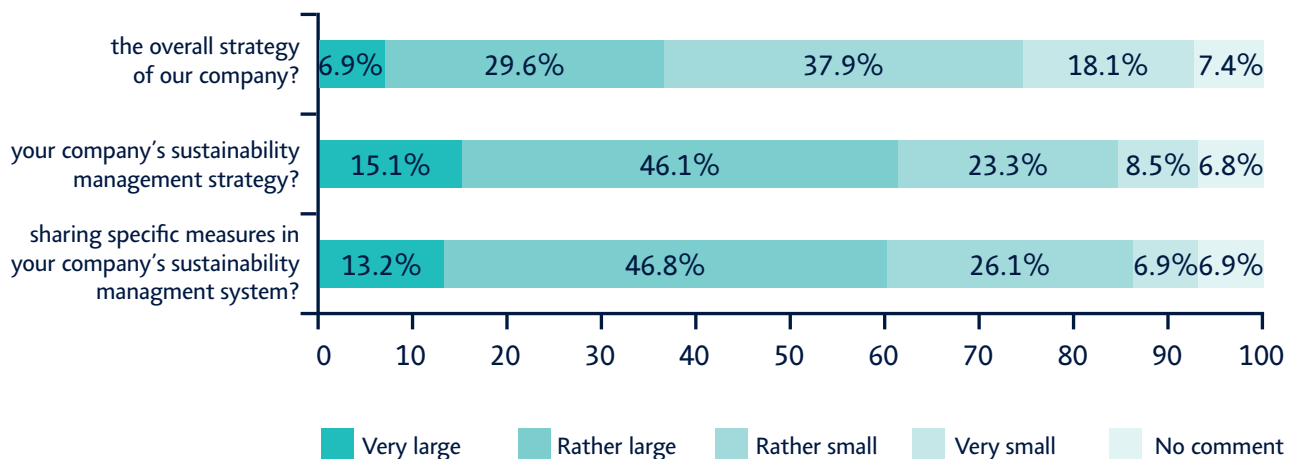
Corporate strategy is influenced by sustainability requirements

Core elements within these investor decisions are the sustainability ratings. But also companies appreciate their inherent worth. They can benchmark themselves against their industry peers and get valuable guidance and information on how successful their own sustainability-related processes, strategies and goals are. This understanding of the importance of sustainability affects not only sustainability aspects within the company, but is also more and more incorporated as part of the general corporate strategy. It is thus not surprising that

already a third of the polled companies (36.5 per cent) rate sustainability analysts' inquiries as having an impact on their general corporate strategies.

Also, over 38 per cent of the respondents said that individual concrete measures that had been implemented by their companies were in response to sustainability rating agency inquiries. These range from diversity and gender equality policies, general documentation- and reporting-transparency guidelines to human rights-related due-diligence obligations regarding the treatment of indigenous peoples.

What is the impact of sustainability analysts inquiries on...



The UN Sustainable Development Goals – a framework for the future

There is a great deal of agreement that the broad field of sustainability needs a framework with clearly defined objectives so that every company can align its efforts towards it and can also be measured against it. Here, the UN Sustainable Development Goals (SDGs) could be the solution of choice. However, at present, the picture is mottled with respect to their meaning: only 36.2 per cent of the respondents use the UN SDGs along with other initiatives as a rough orientation for their sustainability strategies. At least half of all companies said they need more support and assistance with regard to implementing and applying the goals of the UN SDGs.

Conclusion

Sustainability in corporate management can pay twice. It can improve a company's business performance and have a positive impact on environment and society as well as making a company an attractive object for responsible and sustainably oriented investors. It is up to companies to understand, translate and leverage the potential of this lever.

THE FUTURE OF URBAN MOBILITY

Interview with **Claus Fleischer**, CEO, Bosch eBike Systems



The eBike stimulates our mobility and is one of the most agile, comfortable and smartest vehicles of our time. Where does the journey go? WFSGI interviewed Claus Fleischer, CEO of Bosch eBike Systems, who works on the future of a mobility, which is healthy, and economically and ecologically sustainable.

How satisfied are you with the eBike market development?

The eBike market development progresses quickly. eBikes are now part of lifestyle and have long arrived in the centre of society. This is partly because a growing amount of people love up-to-date and sustainable mobility that's both fun and healthy. This is reflected in sales figures: pedelecs are the growing sector of the bike market.

What's the situation like in Europe, Asia or the U.S.? Where are the biggest chances for growth?

Germany, Austria, Switzerland, the Netherlands and Belgium have the strongest bike markets in Europe and live a special bike culture. These countries were the first to accept pedelecs on the market and now have a high share of eBikes. Italy, France, Spain, Scandinavia and the United Kingdom are slowly catching up. Australia and New Zealand are emerging markets. In the U.S., at least the attention towards eBikes is increasing; however, compared to our European core markets, the U.S. lack some three to five years of market development.

New brands from the automotive industry are starting to get active in the field of motors for eBike. Who do you think the drivers of the eBike business in the future will be?

As technology business and worldwide largest automotive supplier, Bosch has a perfect market position. The development of the eBike system was based on expertise from within the



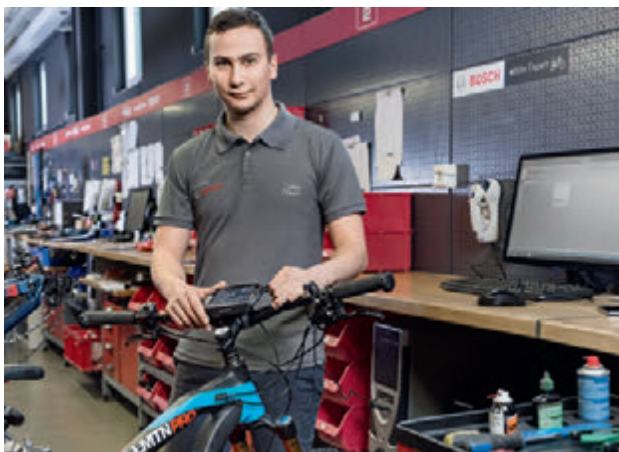
Group: lithium-ion batteries from wireless power tools, electric motors, electronics and sensors from the automotive industry. For the company, electromobility is an important future area. Only in 2016, Bosch invested €400 million to support the breakthrough of this forward-looking technology. The company has already realised more than 30 series projects for electromobility. Around 1,800 Bosch experts work on the future topic of electromobility within the Bosch Group. The eBike technology benefits from this wide engagement portfolio. Thereby, the Bosch eBike Systems portfolio is in line with the strategic principles of the Bosch Group. Future mobility will be electrified, automated, and connected. With the eBike, we have already achieved this.



Digitalisation is getting more and more important in the industry. How does this affect classic bike retail?

A representative Bosch study on the eBike market shows: For 74 percent of the participants, the bike dealer is the first choice for buying an eBike.

There are numerous indicators that classic, stationary bike retail will keep this high relevance also in the future. Not everything can be digitalised that simply: e.g. test rides, repairs, retrofitting or maintenance. In addition, the eBike is a technical product requiring consultation and good service. Many clients prefer a personal conversation in order to find out which model suits them. In this case, the stationary dealers are clearly in advantage over „exclusively“ online providers. But stationary retail also has to open itself more and extend its business with online services.



Technical development in the eBike sector also progresses quickly. What can we expect here in the future?

Technically, there is a large potential for innovation. Drives and batteries are getting smaller, lighter and better integrated in the frame design. In addition, energy and intelligence for bikes also allows for light, gear shifting, damper, navigation and many other functions to be controlled electronically. Via smartphone and the Internet, pedelecs are connected and offer the riders many additional advantages from digital services.

New technologies enable new concepts of mobility for the urban area. What role can the eBike take here?

From our point of view, a very crucial one. Cities in the 21st century face big challenges. The world's population is growing, resources are dwindling, and our climate is changing. Solutions are needed. Electro mobility can make a significant contribution to sustainable development and better life quality. Pedelecs are developing into an important factor in the modern mobility mix. They enable individual mobility, which is at the same time healthy, efficient and sustainable.



QUANTUM LEAP IN BICYCLE DEVELOPMENT

By **Bernd Lesch**, Director Marketing and Product, Winora Group



In 2017, the fascination for cycling celebrated its 200th anniversary. The innovations in the bicycle industry have been growing ever since, from pneumatic tyres to derailleur systems and carbon frames. Many companies have been created to contribute to this huge success, eventually vanishing after only a short period of time. The German company Winora, on the contrary, has been in business for nearly 100 years, in 2010 achieving a quantum leap by presenting the first mountain bike with electric support: with the models of the Winora brand Haibike the first eMTB was born – a global innovation.

Winora's history started in the Lower Franconian town of Schweinfurt about 100 years ago: In 1920, the racing cyclist Engelbert Wiener founded a small company, which produced and sold bicycles. For many years, the company was under family direction, continuously expanding and further developing the bicycle production. Already in 1963, their first bicycle factory with assembly line was opened. In 1995 the brand Haibike was founded, focusing on highly sportive and innovative bikes. In 2010, the complete company merged with the Dutch Accell Group. Currently 350 employees are working at the Schweinfurt site, making Winora one of the region's largest employers.

Haibike positions itself as inventor of the completely new eMTB category.

Early on, Winora sensed the mega trend eBike and presented a real innovation in 2009: The world's first integrated T-shape battery. In the background, however, the Haibike engineers were already working on something completely different. There is no other segment of the cycling world better suited for the use of an electric motor as support for the own muscle power as mountain biking: many altitude meters have to be climbed, it often takes a long time and a lot of effort before you can finally enjoy the downhill rides. Saving your energy allows you to have more fun on downhill tracks and more importantly to ride safer. Thus, at the 2009 Eurobike trade show, Haibike presented the much-noticed first electric mountain bikes of the XDURO range.

eMTBs are trending

The development of eMTBs is really the premium class but at the same time very controversial: people demand highest motor and bike performance at the lowest weight possible and in compact dimensions. Thanks to several inventions, Haibike manages to provide all of this: Haibike was the first to build bikes with a motor positioned upside-down in the frame which enables perfect frame geometry integration and considerably higher ground clearance. This, as well as the SkidPlate for motor protection which was also developed by Haibike, is now standard for almost every manufacturer.



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In 1920, the racing cyclist Engelbert Wiener (holding the bike) founded a small company which produced and sold bicycles.



Tons of new innovations

Every season the bike industry raises the standards of their models: The bikes get ever faster, they lose weight whilst gaining a higher reach and their riding behavior is object to further improvements. The Haibike Enduro-Crew e.g. impressively demonstrates what is now possible with the bikes. They compete in Enduro contests with their eMTBs, which allow them energy-saving uphill and fast downhill rides and to regularly achieve top results. In 2015, Haibike presented the XDURO DwnHll PRO, the first real downhill bike with e-motor. It opened a completely new world beyond shuttles and mountain railways. Right from the beginning, it has been a big success. Thanks to new, complex manufacturing processes, it is possible to elegantly integrate the battery in the frame tube of current models. The next step was eConnect: a small unit integrated in the eBike sends and receives data. This enables features like e.g. GPS-based theft monitoring, bike tracking and route recording – all administrated via one app.



In 2015, Haibike presented the XDURO DwnHll PRO, the first real downhill bike with e-motor.

The future of eBikes starts now

Despite all of the industry's success, the potential of eBikes is far from being exploited. A new eBike era is about to begin: Higher reach, faster charging times, lower weight, higher comfort – all this will ensure that soon the eBike won't only be used as a leisure transport medium but also as a commuter vehicle, being an excellent, fast and environmentally friendly alternative to the automobile or public transportation.



There is no other segment of the cycling world better suited for the use of an electric motor as support for the own muscle power as mountain biking.

CYCLING AND THE FUTURE OF R&D

Interview with **Nicola Rosin**, General Manager, Selle Royal Group



Founded 60 years ago in Vicenza, Italy, Selle Royal Group is a collection of global brands consisting of bicycle components, apparel and footwear including Selle Royal, fi'zi:k, Crankbrothers, Brooks England and PEDAL ED. The group now has offices and production sites all over the world with many of its brands market leaders in their fields. A new corporate strategy for Selle Royal Group has been developed at top level, creating more fluidity and cross-networking internally between the brands. The group has just hit a milestone by opening its first dedicated Research & Development facility in Ogden, Utah, USA, becoming the group's strategic R&D center.



Research and development in Italy

You state that disruption and innovation is at the core of the Selle Royal Group: How has Selle Royal been able to keep innovating throughout the years?

PEOPLE. Since Selle Royal was founded by Dr Riccardo Bigolin, our drive to innovate has always come from within. In order to bring innovation to life and disrupt the norm, we focus on having the right personalities within our team who are curious, fearless and who want to break barriers. Innovation doesn't just come from creative minds but also from the people whose hands create our ranges. Our factory workers know the products inside out and are a great source of knowledge and ideas. This internal innovation network is only possible when you grow and nurture the people within your organization; we aim to offer a greater sense of individual responsibility and

purpose within the company that we call in the internal vocabulary the sense of "ownership".

You've opened the new R&D facility in Utah: how did you decide that this would be the group's next move and what is the new approach?

The state of Utah - and Ogden in particular - is investing heavily to become a point of reference for the outdoor and cycling industry. As a Group, we offer many products within this industry and look to expand even further. By investing in this facility, which is initially focused on our hard goods and component projects, we believe we will be able to attract new and talented minds to help lead us into the future. This new centre features a smart and functional architectural design with a test track and spacious open areas to create an environment that sparks innovative thinking.



Research study presentation



What do you see as the biggest challenge for R&D in the future, as both a brand and for the industry of sporting goods itself?

Today's consumer is very knowledgeable and every year they become more demanding and more conscious of their own needs. A challenge for us is to adapt to their ever-growing desires, real innovation needs to be a constant output to improve our consumer's cycling experience, whatever their cycling style. This has led us to prepare professional platforms to reach out to our customers and collate data for analysis, helping us develop our products with a larger customer insight in the future.

Are there any costs or sacrifices you need to make to be a constant market innovator?

Yes, unfortunately it is not possible to do everything. Giving priority to innovation and being a constant market innovator implies that some difficult choices need to be made. Being an

innovator means developing new products even if there is not yet a clear market demand. We innovate to be brand trendsetters and market leaders, and although the demand may not be realized in the particular moment, our creations inspire bigger things. Some of our products in our past ranges have not necessarily generated huge sales but were important to open new doors and new sectors without having the sales as a benchmark for the success of a product.



Crankbrothers
Opium 3 wheel



fizik Infinito R1 cycling shoes

What are the aspirations for the group from investing in the new American research facility?

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NEED FOR SPEED DECISIVE FOR BIKE SECTOR'S FUTURE

By Jack Oortwijn, Editor-in-chief, Bike Europe



The World Cycling Forum that took place June 7 and 8, 2017 painted a clear picture on where the bicycle sector needs to head to. It's about concentration on the consumer and its need for speed. As consumer behavior and new technologies are bringing rapid changes to the bike business, the WFSGI in cooperation with the international trade publication Bike Europe, organized the World Cycling Forum which took place in Porto, Portugal.

At this bicycle industry's first ever 2-day congress a series of expert speakers explained to the close to 200 high-level participants in detail that online ordering will soon dominate the retail landscape. By sketching parallels with what is already happening in other sectors and how they are responding to these drastic changes it became clear how the bike sector is to address the current changing consumer behavior towards rapidly increasing online sales.

100 per cent product availability

How the bike sector can anticipate on such changes is by becoming consumer centric. Think not inside companies but think of what consumers want. Their demands come first in particular as dissatisfying consumers is a deadly sin. This requires a 100 per cent product availability which is currently not fully achieved throughout the bicycle industry. In order to improve the performance in product availability lead times

have to come down. It results in "speed becoming the new currency", said one of the keynote speakers of the World Cycling Forum. And as speed matters "simple is beautiful and companies have to become data smart."



The first ever bicycle industry congress was made possible by the WFSGI Bicycle Committee in cooperation with Bike Europe.



Close to 200 participants joined the World Cycling Forum last June in Porto, Portugal.

Need for speed

Taking the consumers need for speed very seriously is done by adidas. How this is done by the sporting goods giant was underpinned by the fact that adidas not only has a Vice President SPEED but a SPEED factory as well which is located in Germany. That SPEED factory allows for a less than two months lead time for making products that have proven themselves to be the best in the selling season. IT makes it possible to produce more best sellers in May that go on sale late June.

Digital driven and shaped companies

How to become a digital driven and shaped company was also presented at the World Cycling Forum. The main message here was: Get your data on consumers right! How to analyze data means that companies must make digitization one of their core competences. This involves culture changes at companies even up to computer nerd youngsters becoming executives.

Need to change current business models

What also became very clear at the World Cycling Forum is that making a successful transition to the new reality of continued growth of online ordering means that current business models have to change and have to change fast. Many of the bike sector's current business models are already in use for decades. One of the World Cycling Forum's keynote speakers defined this as "From selling products we produce we have to turn to producing products we sell."

Side-program

The first ever congress for the bicycle industry was made possible by the WFSGI Bicycle Committee in cooperation with Bike Europe. That the World Cycling Forum 2017 took place in Porto, Portugal had everything to do with the fact that the country is becoming a major production center of bicycles, electric bikes and parts in Europe. This is stimulated by the Portugal Bike Value project by attracting more companies to

Companies located at Portugal Bike Value – one of the forum's main sponsors – presented themselves at the InfoMarket.



Alfandega Porto Congress Centre proved a perfect location for sunshined networking.

set-up a base in the country. Portugal's ideal geographical location, capacity of supplying and integrating with technology centers, universities and local authorities, prove to be important pillars, for example for Decathlon to consider reshoring its bicycle production to Europe. Portugal Bike Value was one of the main sponsors of the World Cycling Forum as the congress offered the high-level participants an opportunity to learn more about the Portugal Bike Value project that takes the bike sector in Europe one step closer to more flexibility, customization and - above all - to the consumer. Companies located at Portugal Bike Value presented themselves to the congress participants at an InfoMarket.

The World Cycling Forum 2017 was held at the Alfandega Porto Congress Centre which is located on the banks of the Douro river. It proved to be a perfect location.



MATERIAL INNOVATION

THE SKY IS THE LIMIT

By **Jan-Anders Mansson**, Distinguished Professor, Purdue Uni., USA; Honorary Professor, EPFL, Switzerland; Scientific Advisor Sport Technology, AISTS; & **Joshua Dustin**, Senior Application Engineer, PhD, Aerospace & Sports Composites, Purdue University, USA



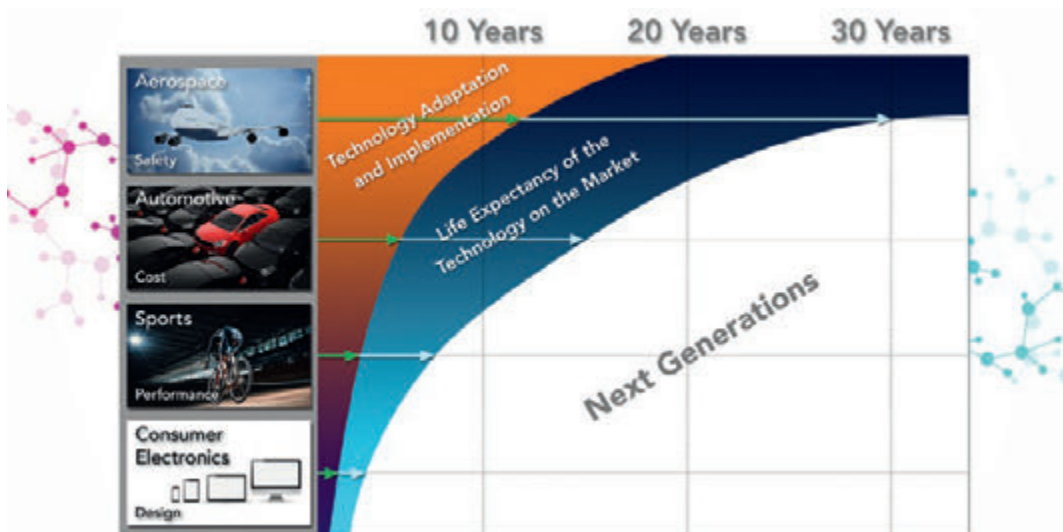
Innovative material and the related new technologies in sport equipment and apparel play an important role in competition sport; these are a fundamental part of a full sport experience and the evolution of sport and society. The sporting industry has and will continue to be one of the leaders in the integration of emerging material technologies. However, to gain the full leverage of new materials and technologies targeted for the competition sport market, a synergy of performance, safety, and fairness is required to reach the full potential for excitement and attractiveness.

Survival in any market requires constant effort to anticipate developments beyond the current horizon and to overcome limitations before the competition. History has shown that market leaders embrace innovative materials as an integral part of their product development approach to achieve:

- Product differentiation
- Productivity expansion
- Cost-efficiency
- Weight reduction
- Design opportunities
- Market exploration
- Record setting performance
- Safety improvements

Novel materials are a main contributor in the development of many fields in today's society, ranging from lighter and safer cars and airplanes to more comfortable and protective clothing. Sport equipment and sport apparel sits at the forefront of the rapid adoption of new material technology, as survival in this industry requires continuous record setting improvement and increasingly captivating design.

Future sport market leaders will address the accelerated appetite for smart and tailored sport equipment and apparel by combining emerging technologies with material developments such as the integration of electronic devices and customized equipment and apparel made possible through 3D-printing. Such innovation must be managed so that athletes and



With the performance margins between athletes becoming smaller and smaller, the involved equipment becomes increasingly important. This results in an extremely competitive sport market and drives its reputation as a primary early adopter of new technologies.

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consumers maintain a close connection with the essence of the sport that holds their passion, while also developing the important desire for new equipment and apparel technologies which drive future industrial growth and progress.

The fast implementation in the sport technology

With new products and processes being so quickly developed, adopted, validated and implemented, the survival rate of these products and processes is usually fairly limited as new products and processes are rapidly replaced by the next generation. This complementarity in implementation dynamics provides great opportunities for efficient technology exchange, and realization of mutual benefits for industrialization of new innovative technologies. Experts from other fields enter the stage, new ideas formed, new shapes designed, new materials developed, etc. Sport has and will continue to serve as a high profile test-bed for new technologies in order to gather valuable experience across market borders.

Emerging technologies accelerating sport innovation

The fast influx of new equipment, devices and apparel on the market is developed from a network of emerging technologies, the integration of which provides exceptional potential benefits:

Material Science: New materials with unique properties -> Exceptional mechanical and frictional performance

Neuro Technology: Matching of brain response with cognition and perception -> Tailoring dynamic properties of material and equipment

Computer science: Super-computing and simulation software to lower cost -> Reduction of multiple and costly steps of prototyping and testing

Miniaturization: "Intelligent" devices with adapting functionality -> Equipment and garments with integrated electronics for sensing and adaptive functions

Human modeling: Scientific understanding of body functions and performance -> Optimized training efficiency-supports and aids



Information and Communication Technology (ICT): Massive and open access to new technology -> Less restricted and fast implementation of new technologies

Digital Manufacturing (3D-printing): Manufacturing directly from digital information -> Fast and cost-efficient manufacturing with personalized design

Sustainability: Increased societal demand on sustainable material solutions -> New greener and cost-effective materials providing alternative use opportunities

Adopting and combining these various emerging technologies opens up an opportunity space enabling personalized and optimized design, incorporation of sensing and adapting elements, “greener” and more cost-effective solutions, improved support devices for analysis and use, and product differentiation in the rapidly evolving “device” market.

Managing sport innovation – a balancing act

Managing the fast evolution of material and devices entering the competitive sport arena is very challenging as the technology of the sport equipment must never overshadow the effort and accomplishment of the athlete for fear of alienating the human element of competition which draws the individual to the sport. Proper management is accomplished by respecting some limits during the innovation process:

Level playing field: New technologies push the limits of performance and records. It is of paramount importance that

new technology doesn't erode a level playing field. Accessibility and affordability should be respected to not discredit one athlete vis-à-vis another.

Safety and security: In the chase for smarter and more efficient material and equipment it is easy to cross the border which exposes athletes or spectators to unnecessary risk or harm. New equipment facilitates higher speed and often more violent bodily impact.

Tradition of the sport: Many sports could evolve much faster if there were no limits for how a sport should be performed. Faster bicycles or faster swimsuits are easily achievable today if certain rules are eliminated. However, when we lose historical connection or emotional relation to a sport we also have the tendency to lose the attraction to the sport. It is therefore important not to get “speed-blind” and lose the genuine relation to a sport.

Business drive: There must be room for innovative materials and technologies to enter competition sport. Sports are a reflection of our society and to not have the latest technology appearing on the sport stage would be detrimental. Athletes, sports and event organizations as well as the sport industry all gain from having a modern and dynamic sport stage, which must be protected and cared for.

The stage of sport innovation: Necessary boundaries ensure that innovation in sport technology produces positive outcomes for the sporting community.



DIGITAL AND AUTOMATED BUSINESS OF THE FUTURE

By **Leonie Barrie**, Editor, just-style



Faced with a paradigm shift in everything from the way products are sold to the tools and technologies that make them, sporting goods brands, retailers and manufacturers are still trying to work out the best way to navigate this rapidly-changing landscape. Help was at hand at the fifth WFSGI World Manufacturers Forum, which took as its theme 'Moving on to a digital and automated business of the future.'

The key message was that a host of new technologies and disruptions are coming at the sporting goods industry, and that businesses should not underestimate their impact. In other words, disrupt – don't be disrupted.

Robotics, artificial intelligence (AI), automation, big data, digitalisation and on-demand manufacturing were among topics discussed. Much talk centred on the challenge of incorporating these into apparel and footwear manufacturing, given the flexible and unpredictable nature of the materials used, the vast range of styles and sizes, the lack of standardisation, and ever-faster product cycles.

Automated factory floors, and the use of real-time data to drive efficiency and responsiveness, sound great in theory – but are more difficult to put into practice.

Even Prof. Dr.-Ing. Sami Haddadin, Director of the Institute of Automatic Control at Leibniz University Hannover, admitted that while robotic automation is moving towards flexible objects, clothing remains a major challenge.

Likewise Heinz Eisenbeiss, Head of Marketing Factory Automation at Siemens, demonstrated how the virtual and real production worlds can be linked by simulating machines and plants using 'Digital Twins' – but was unable to find an example to share from the world of sportswear.

One company whose vision is moving closer to reality is SoftWear Automation. Its 'Sewbot' driven worklines and workcells are designed to bring manufacturing closer to the consumer – what Chairman and CEO Rajan Palaniswamy called 'SewLocal' – reducing production cycles to just a few days, as well as cutting shipping times, inventory, and carbon emissions. Its automated T-shirt line is set to go into production in 2019.

When it comes to using data to drive change, Professor Jay Lee from the University of Cincinnati explained it's all about collecting the right data, and asking the right questions of it. "Learning to differentiate between data mining and machine learned big data will be the way to figure the future," he said.



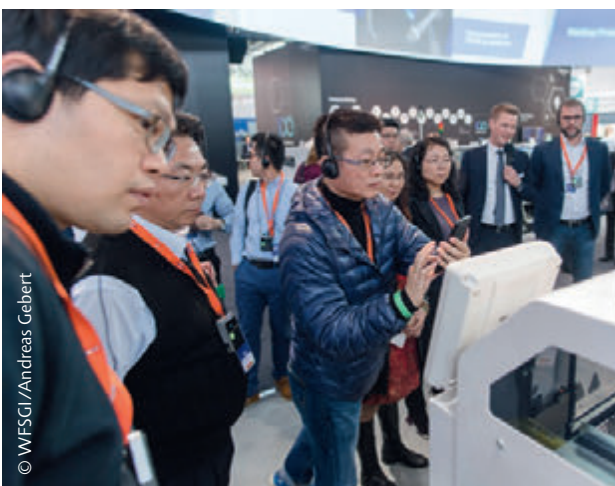


The impact of digitalisation on the apparel supply chain is top of mind for sourcing executives, according to Karl-Hendrik Magnus, Partner at McKinsey & Company. Its latest survey found demand for shorter lead times and smaller order quantities is more likely to be met by digitalisation of the end-to-end creation and sourcing process than by shifting to lower cost countries. His advice? Start small, scale up, and collaborate.

Another potential disruptor is printed electronics, already found in smartphones, tablets and TV sets. Dr Klaus Hecker, Managing Director of the Organic Electronics Association, said sportswear opportunities will include smart textiles and clothing with integrated batteries, loudspeakers, lighting and sensors that can improve performance, injury prevention and recovery.

Consumer demand for personalisation is driving much of the disruption at retail, according to Kurt Cavano, President at GT Nexus. Another "tectonic shift" has seen companies like Uber, Facebook, Alibaba and Airbnb become market leaders without owning any of the assets they're selling. "What's coming together is cheap capital, 'Uberisation' (the sharing of stuff), technology; it's all merging to allow new companies to come along very quickly and disrupt the sleeping giants above them."

Hosting the Forum's Future Workshop, Cavano challenged delegates to come up with a disruptive idea. "It's a lot better to be disrupted by yourself than to be disrupted."



Many of these platforms are also driving a new on-demand economy and increasing the complexity of workforce management, said Denis Pennel, CEO of the World Employment Confederation. Around 61% of workers worldwide already work in an informal way and only 26.4% have formal contracts. Implications include recruitment, data protection, health and safety, and how to give a voice to dispersed and independent workers.



"We are at an inflection point," summarised moderator Edwin Keh, CEO at the Hong Kong Research Institute of Textiles and Apparel (HKRITA). "Working harder at the same things we're doing today isn't going to make our businesses better or more profitable. Instead, we need to think about new opportunities."



THE AGE OF ROBOTS AND MACHINE INTELLIGENCE

By **Prof. Sami Haddadin**, Director, Institute of Automatic Control at Gottfried Wilhelm Leibniz Universität Hannover, Germany



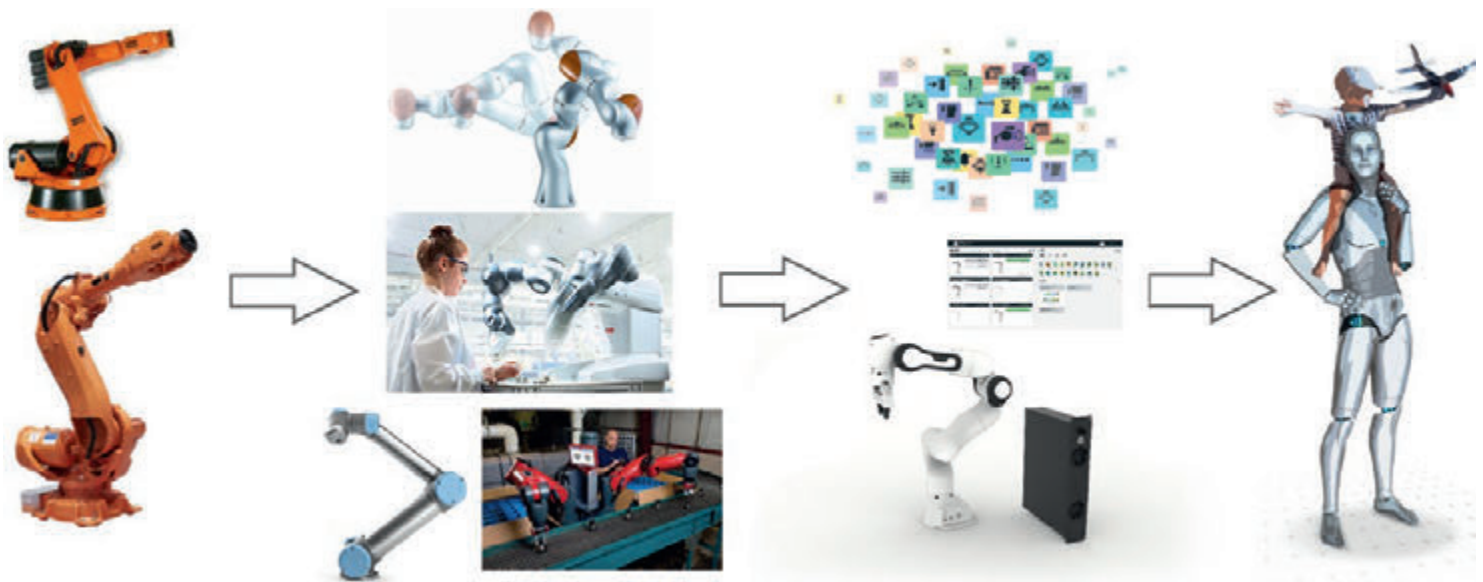
The field of Robotics and Machine Intelligence has advanced tremendously over the last decade. We have only recently seen the first semi-autonomous cars entering the market, remotely controlled drones being used in various domestic and professional applications, robots supporting doctors in minimally invasive surgeries and next generation intelligent manufacturing robots coming out of the safety cages to enter our work environment and support human workers.

Robots have advanced beyond simple positioning machines known from car factories to collaborative robots, and just recently reached an entirely new level of soft robots capable of learning, interaction and connectivity [1,2], see Figure 1.

We will have robots working in factories 24/7 doing dull and dangerous jobs in all parts of the world. Robot helpers will support elderly people at home in daily activities to preserve their autonomy and prevent the need to go to nursing homes. Major enabling technologies such as the mentioned novel

robot embodiments capable of physical interaction and equipped with an artificial sense of touch (“feeling”) together with increasingly advanced perception (“seeing”) and learning capabilities have already proven to work in the real world. >

Figure 1. Evolution of manufacturing robots from industrial robots, via collaborative robots to interconnected learning-enabled soft robots (images by courtesy of Franka Emika, ABB, Rethink Robotics, Kuka).





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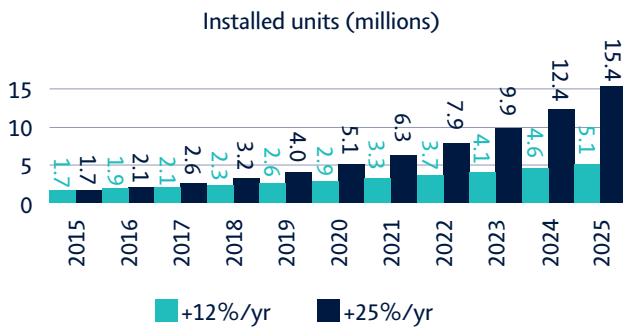
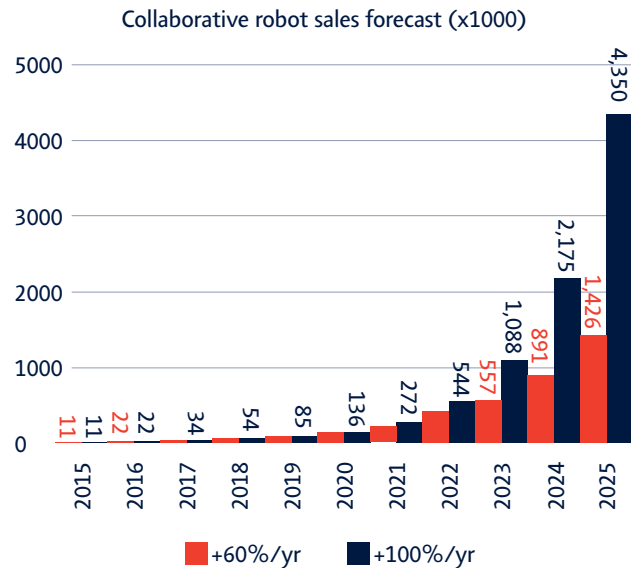


Figure 2. Install base forecast for industrial robots (left) and collaborative robots (right)



>

Statistics indicate a significantly increasing trend in the worldwide demand for industrial robots [3, 5, 7, 8]. For instance, the International Federation of Robotics (IFR) anticipates a sustained increase of 12 per cent from 2015 to 2017 [6]. Figure 2 (left) shows the installed base of industrial robots for a 12 per cent and 25 per cent yearly increment projected until 2025. These numbers are comparable to a slightly more conservative prediction presented in [4].

Up to now, these numbers still exclude collaborative robots and service robots. Currently, the former represent 5 per cent of the market. However, it is expected that by 2020 it will increase by an order of magnitude [9, 10]. Figure 2 (right) depicts the expected sales and corresponding energy consumption for this class of robots. Likewise, service robots are booming, for example, the IFR expects that the sales of privately used service robots will increase to around 35 million units by the year 2018 [7].

Obviously, with this beginning mass market and according democratization an entire industry around robots and machine intelligence will emerge, with autonomous cars and Industry 4.0 being only the very first steps. From a manufacturing point of view, we have finally achieved the ability to automate assembly tasks with the new soft robots. As a next consecutive step I envision that flexible automation of first soft materials in manufacturing is now within reach, a possible quantum leap for the textile industry. In particular, shoe manufacturing may significantly benefit from the new abilities of soft robots as a tool for the human, i.e. large potentials for human-robot teams and realizing economic textile manufacturing in Germany and Europe. Similar to the current trends in Industry 4.0, where mass customization is becoming increasingly possible with intelligent robotic assistance, this could be a major opportunity for the sports industry as well. The general handling of clothes and textile matters, however, will still need several years of further research and technology development.

Altogether, these are exciting, challenging and dynamic times and we will experience major shifts in the way we live and work. Presumably, the age of robots and machine intelligence will be one of the largest technological disruptions we will have ever experienced. Thus, we also need a responsible continuous, thorough, and reflective discussion about its societal and economical impact.

[1] www.franka.de

[2] <http://spectrum.ieee.org/robotics/industrial-robots/franka-a-robot-arm-thats-safe-low-cost-and-can-replicate-itself>

[3] B. Brenner. Japan unleashes a robot revolution, May 2015. Retrieved March 8, 2016, from: <http://www.bloomberg.com/news/articles/2015-05-28/japan-unleashes-a-robot-revolution>.

[4] Harold L. Sirkin, Michael Zinser, and Justin Rose. How robots will redefine competitiveness, September 2015. Retrieved March 8, 2016 from: <https://goo.gl/YxPfyF>.

[5] Statista. Estimated annual industrial robot shipments in selected regions worldwide from 2010 to 2018, by region (in 1,000 units), 2016. Retrieved March 8, 2016 from: <http://goo.gl/W4TR3T>.

[6] International Federation of Robotics. World Robotics 2014 Industrial Robots. IFR Statistical Department, 2014.

[7] International Federation of Robotics. China enforces historic robot boom, 2016. Retrieved March 8, 2016 from: <http://www.ifr.org/news/ifr-press-release/china-enforces-historic-robot-boom-776/>.

[8] W. Knight. China wants to replace millions of workers with robots, December 2015. Retrieved March 8, 2016 from: <https://www.technologyreview.com/s/545056/5-robot-trends-to-watch-for-in-2016/>.

[9] Frank Tobe. Why co-bots will be a huge innovation and growth driver for robotics industry, December 2015. Retrieved April 5, 2016 from: <http://goo.gl/hRG5Du>.

[10] Frank Tobe. Collaborative robots are broadening their marketplaces, April 2016. Retrieved April 5, 2016 from: <http://goo.gl/MG3p0P>.

DISRUPTIVE CHANGE IN THE FOOTWEAR INDUSTRY

By **Christian Decker**, Managing Director, DESMA



Looking 100 years back, we have seen many trends come and go. We are now in 2018 and for several years in an intensive discussion about change, digitalisation, speed to market and other buzz words like IoT or Industry 4.0 (originally Industrial Revolution 4.0). This has all been observed by us with some relaxation, because we expect it to be just another trend coming and going, but something is different ...

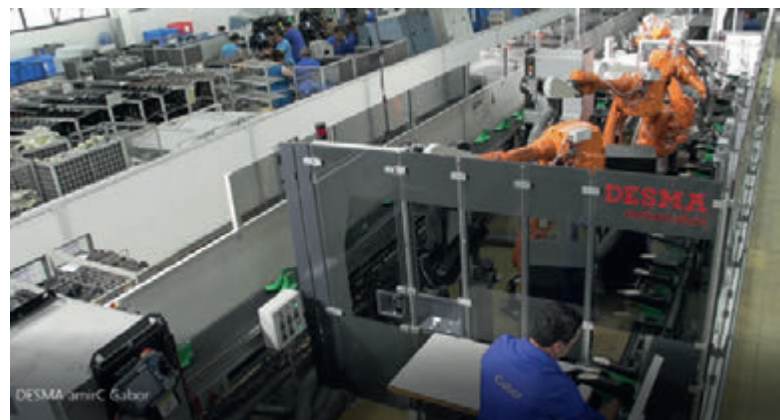
There is a whole industry talking about it, even multiple industries are taking this into focus, and politicians are talking about this subject too. This headline seems more serious compared to other trends in the last 50 years. Therefore, we need to look at it closely to find out what the impact on our business will be. Let us talk about digitization and what this means for a full digital integration of all steps - from product description through production to the product exploitation phase, where a product is used by the client. We are talking about a total digital chain that integrates all stakeholders. Let us take footwear, just as an example, and the following description can be transferred into many other industries:

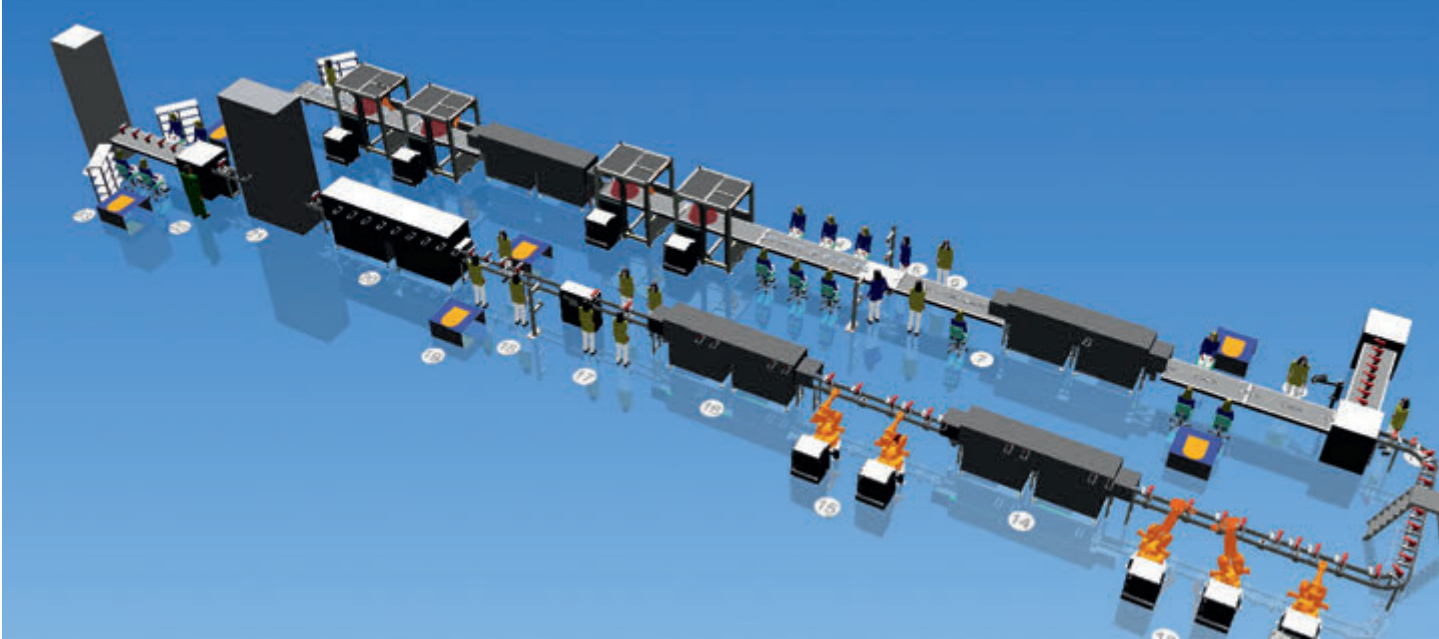
A designer starts the first sketch in a design system and after finishing the multiple designs, he or a colleague works on the detailed design choosing and defining materials from a database provided by his raw and pre-material supplier. This includes information on possible options of combining it with the next material and the type of glue corresponding to the selected EVA soling material chosen from a list featuring advantages of each selected option. Finally, the design phase is finished and the generated project data set will be sent to manufacturing planning where the suggestions of single process steps for this type of shoe will be aligned. It is at this time that the equipment for this process step will also be suggested and selected.

The data set is now available for the commercial departments to select markets and numbers. Ideally, they do not decide to push the product into the markets, but undertake marketing campaigns and wait for the consumer response on the digital

shop platform which will be visited by the consumer from his smartphone or any other digital device. Customers already have accounts with their preferences of running distance per week, their individual walking, foot and body profile. Within the first 24 hours after global publication orders for this new shoe type are collected worldwide. These 24 hours will be the most interesting for the stakeholder in regard to disruptive change.

The worldwide collected orders will be assigned to three continental production hubs which begin production of any required tooling parallel to time consuming component manufacturing processes. Integrated optimization processes are bundling the orders for each production hub depending on size, distance to the end consumer and shipping time. 3D printers will use the data sets, which have been automatically generated based on the sole geometry, to manufacture the molds in special polymeric compounds. Knitting machines will start to automatically change the yarn rolls to the required material and colours, and begin the pairwise production of the upper-butterflies and stack the material sorted by size and colours.





Two highly qualified workers support production, but their main task is the manufacturing planning. The molds are ready printed and will be automatically pushed into the laser texturing unit. They are picked up by automatic transport devices 7 hours later to be forwarded to the mold warehouse. Simultaneously, automatic last-making machines will produce lasts with high precision, based on recycled shoe sole materials. It takes 10 minutes to produce a pair of lasts and push it into the last warehouse.

The next step is the actual production of the shoe. The finished upper butterflies will be loaded from the buffer into the automatic 3D lasting device, where the last has been put before. The wrapping process is done by a two-arm robot system and the closing will be realized by laser-roll welding. Simultaneously, the corresponding mold will be automatically changed on the injection machine and the last with the upper will be loaded on the same unit. The mold will be closed and the sole will be injected directly underneath the textile upper. After a short reaction time, the last will be changed and the next prepared pair of uppers will be fed into the machine. The next pair is produced in a different colorset of the upper and the sole. The shoe last will first be moved to a decoration station, to laser a texture into the forefoot section and print the consumer's name on the sidewall of the sole, before the finishing operation with a two-arm robot starts, which cleans in a flash and polishes the sole sidewall.

The shoe contains an NFC chip which was applied in the knitting machine into the upper, so tagging is not required. The shoebox machine prints the individual box with the consumer's name and shipping labels, and the box is automatically loaded with the pair of shoes. The shipping contractor has been informed two hours before production about package size, weight and target address and arrives 30 minutes after production ends. The consumer will receive the pair of shoes

maximum 36 hours after placing the order if located on the continent of production. In special cases, the delivery takes 48 hours after ordering. For already existing mold sets the total order process can be handled within less than an hour and if the consumer and the production are in the same location, the pair of shoes can be handed over like "freshly baked bread". A collection of many cameras records quality and processes in the total line while hundreds of sensors deliver a huge collection of data for immediate or later analysis.

These production lines will become a reality within the next years, disrupting existing business models fast. The question is not whether it will come, but only of when it will get to totally integrated supply chains which are highly digitally driven.

A key point is to start with a complete digital description of the product, including a full description of materials and the related processes for the physical manufacturing process. Companies should join forces to generate databases of basic and medium-finished materials, and set up digital descriptions of the production equipment for the digital design process and semi-automatic preparation of the production work flow. At this stage the equipment will evolve to reach a point of semi or fully automatic programming for new products.

The description sounds too visionary for many people, but we are growing near and gaining speed to turning this model into a reality within the coming decade. 2028 will be a remarkable year, where we will look back and say: this development was even faster than we thought in 2018. It sounds more like a marketing slogan, but it's true: the future has already started and disruption will touch the business of all stakeholders in the footwear industry ... and other industries, in a similar way.

EVERYBODY BECOMES A RETAILER

By Jorg Snoeck, Founder, RetailDetail.eu



The consumer is fundamentally changing, which creates a sizeable challenge for manufacturers and retailers. The merger between the digital and physical world creates a non-stop retail experience. Retail is not only moving to more convenience, but also to more service and experience, with technology as the ideal ally to offer better inspiration and personalization.

A wave of bankruptcy is permeating the retail industry and while digitization is often blamed, there are deeper issues. We are on the eve of a new economic and industrial age, one that goes hand in hand with a societal innovation that is redesigning how, where, with whom and how long we live.

The 4th industrial revolution brings us 'smart' technology that learns by itself and a digital dimension that becomes entirely intertwined with the physical world, connecting both people and objects. Shopping has become more intuitive, constant and ever-present. Everything is a store and a point of sale. Everyone has become a retailer.

Welcome, new consumer

The world is on the move. New socio-demographic profiles decide the level of demand, purchase behaviour and the way consumers buy. Multicultural society, elderly people, singles, families with children from different marriages... they all have different purchase patterns compared to your average Joe.

New markets and opportunities arise, as in this globalized world different sports and leisure activities from all over the world gain popularity, from Westerners taking up yoga in large numbers to a rapidly growing Chinese middleclass gaining interest in soccer and basketball. Global thus becomes local, while local becomes global as well, leading to parallel import and cross-border shopping.

For decades, companies did whatever it took to draw attention, create a need for a particular product and then convinced the consumer to buy it. This 'purchase funnel' is turned on its head: today the consumer decides a brand's position and how stores act. Consumers want to be informed more than ever before.

When it comes to sports and leisure, the growing concern for health and fitness makes them crave highly-informative and motivational content, helping them make the right choices and achieving their personal goals.

From push to pull

The digital purchase pattern has evolved in the past decade, from the laptop through mobile to applications at home. In 2016 and 2017, we went from Siri showing you the way to the store to Amazon's Alexa actually ordering your products. And we ain't seen nothing yet... Business models alter as well: digital connectivity has made access more important than



Smart technology that learns by itself and a digital dimension that becomes entirely intertwined with the physical world.



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The merger between the digital and physical world creates a non-stop retail experience.

> ownership and is creating new playing fields in a sharing and peer-to-peer economy. The merger between the digital and physical world creates a non-stop retail experience. The customer journey no longer has a beginning and end if the store follows the shopper everywhere. A virtual shelf cannot be empty, whereas only the most surprising and best-selling items make it to the stores. Depending on the location and time, either chatbots, human employees, a brand's fans, holograms or robots will assist the consumer. Retail is not only moving to more convenience, but also to more service and experience. Considering how the most annoying part of the purchase process is taken care of automatically, consumers have more time for an enjoyable customer experience. Technology is the ideal ally to offer more inspiration, a better service, more comfort, a personalized product range and more appropriate pricing.

New markets and opportunities arise, as in this globalized world different sports and leisure activities from all over the world gain popularity.



Retail is everything and everywhere

Just imagine: a smart mirror keeps track of your size and you can use that information to filter an online product range. You can get stores to set aside products, but you will not need to buy or pay. That part will only follow once the mobile app presents the 3D clip from the fitting room to your partner in the evening. The brand also mentions another product on the television, already filtered to fit your preferences. Just add it to your shopping cart, you can pick it up tomorrow.

This is not science-fiction, it's the retail game as leading players in the sporting goods industry – Nike, adidas and the likes – are playing it already. Channels will disappear in favour of one integrated experience targeting the individual buyer. It will become a necessity for retailers to be there for the customer, every moment of the day: retail will become a new business.

Source: Snoeck & Neerman (2017), The Future of Shopping:

The digital purchase pattern has evolved in the past decade, from the laptop through mobile to applications at home.



Waar iedereen retailer is, Leuven: Lannoo Campus. (English version due in 2018)

CUTTING EDGE DIGITAL BRAND PROTECTION

By **Eduard Krämer**, Area Sales Manager Europe, U-NICA Solutions AG



In a globalized sourcing and distribution world, counterfeiting has been an ever-growing concern of most global brands. The sporting goods industry has been amongst the first to use the benefits but also the one having been counterfeited the most. Latest technologies have made great digital brand protection solutions available - where is the vision in the industry's brand protection efforts?

The vision many brand owners have for brand protection is a 100 per cent secure smartphone product verification solution which can be used by company investigators, customs and consumers alike, running on any smartphone model. How can we get there?

Major efforts have been taken in identifying original products or its counterfeits and in uncovering illegal trade, a lot of which nowadays happens online. On the identification side overt features have been suitable to be verified by brand investigators, customs and consumers alike. But counterfeiters have narrowed the gap with high quality counterfeits of those overt features like holograms or special inks. The challenge in the use of covert features is that there are many solutions with different devices needed to verify the authenticity of a product. Adding to this major obstacle (e.g. at customs) is the barrier that brands cannot reach the consumers with a solution which needs an extra device for verification.

Mobile devices and mobile data usage have spread around the globe at breath-taking speed, reaching almost every corner of the planet. In many parts of the world it is the main information and communication option, in some areas the only one. Observing this development, it is no surprise that the technological progress of mobile devices shifted the focus of R&D efforts where smartphones has become the desired verification device. Today's personal communication is smartphone and multimedia based (Facebook, Instagram, WhatsApp, YouTube, etc.). Consequently, the quality of the camera system, i.e. optics, sensors and advanced image processing software is a very important differentiator in the

smartphone industry. This development has helped the innovative brand protection industry to invent sophisticated smartphone based brand protection solutions. As with barcode based product tracking a couple of years ago, the new breed of digital brand protection solutions has become mature, robust and industry proven.

These solutions can be divided into the group where the product itself or the packaging design needs to be modified and the group where no modification is needed.

In the first case the verification software (most often a smartphone app) checks for the existence of the element which has been added or modified. It will return a positive result if that element has been identified correctly and a negative if not. Within this group you will find solutions where visible elements (like a specific barcode, pattern, etc.) are added or others where elements on a micro level, not visible by the naked eye are



Molding part



Watch surface

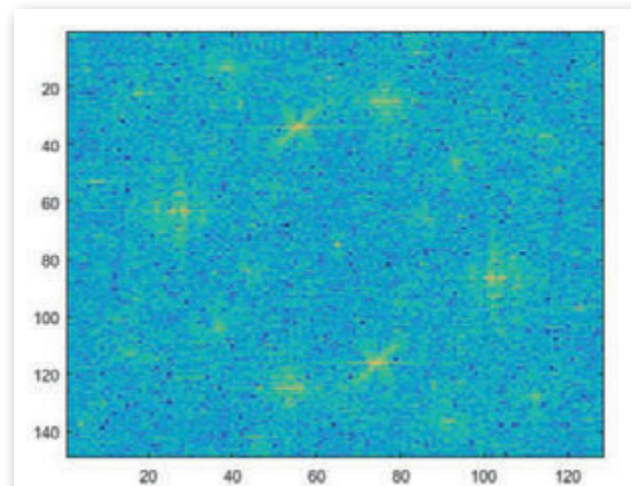


U-NICA Analytics-Software

modified. However, these modifications can be verified with regular smartphones – with the dedicated app of course. A solution where no modification of the product or package is needed seems favorable for the case when the production process shall not be influenced. Solutions in this field focus on analyzing the surface of the product/package on the image taken. The identification and extraction of specific features/structures, possibly reoccurring patterns leads to a unique fingerprint of each single object. Major developments in hardware (miniaturized sensors) and software have taken fingerprint solutions from being a forensic laboratory tool to portable and mobile devices. At the same time deep neural networks and new machine learning technologies allow micro-level feature extraction and lead to intelligent algorithms which are needed to identify a product as genuine or counterfeit. Innovative suppliers are already present in the market.

A major issue with classic digital brand protection solutions, like digital watermarks, is their copyability. Latest cutting-edge developments have resulted in sophisticated Copy Detection solutions. In principle they are based on a print quality check, either of a printed fine-grain pattern (e.g. OWM - optical watermark) or of an area with a complex structure. Copy Detection is a secure anti-counterfeit tool, used by major global brands.

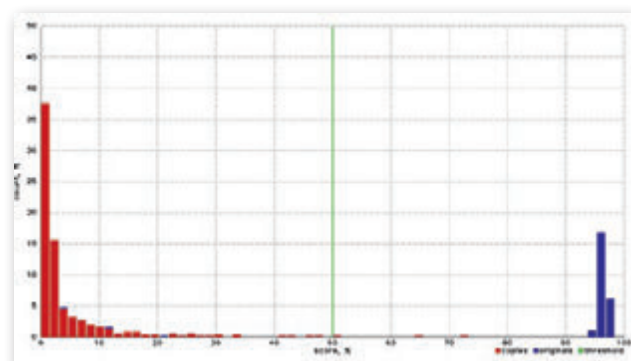
Very attractive cutting edge digital brand protection solutions are already available today. You find buzz words like big data, artificial intelligence, blockchain, etc. as part of the brand protection discussion. The ongoing fascinating developments of mobile devices and machine learning technologies work in favour of enhancements and more sophisticated anti-counterfeit solutions on a regular basis. Personally, I believe that innovative suppliers of anti-counterfeit solutions add substantial value for brands, companies and federations and I am optimistic they can keep delivering additional value in the future.



Morphology of an anti-copy pattern



Smartphone app images



Color-separation algorithm

DIGITAL – THE GREAT CONNECTOR

By **Claude Ruibal**, Executive Director Digital, Production & Sport Solutions, Infront Sports & Media



Today's challenge is that sports fans want to connect with each other and with the sport, not brands. We have all become experts at tuning out the barrage of traditional advertising, because "being sold something" is annoying and intrusive. Our goal is to show both rights holders and sponsors how they can leverage digital solutions and new technologies, such as Machine Learning and Artificial Intelligence, to create valuable and relevant content offerings, alongside opportunities to connect and share – thus becoming part of the conversation and enhancing the fan experience, rather than intruding and alienating.

These days, digital technology is not only pervasive, but it is also expected in all aspects of life. As consumers, we are frustrated if there is no wifi available in stadiums or if there is no App, YouTube video or live streaming to follow our favorite sport. In fact, today the primary initial point of contact for reaching any audience – sports fan or otherwise – is via digital means.

Pretty much everyone agrees that building direct relationships with consumers is key; however the secret is to do so on the consumer's terms – meeting expectations and providing real value. We need to understand the things fans care about the most and consistently deliver those experiences to them. As a

result, simple LED board exposure, VIP hospitality, tickets and onsite activations are insufficient for today's brand marketers; sponsors need to provide fans with customized offerings beyond the traditional channels.

One way to tackle this is by collaborating with new partners to create offerings that will better resonate with fans. A good example is Infront's partnership with Velon, a collective of pro cycling teams working toward engaging more fans into the world of cycling. Together we launched a new series of professional cycling races – the 3-day Hammer Series. In line with the ambitions of Velon to grow the fan base of cycling and

bring fans closer to the action, Velon interactive live rider data was made available to fans through the Velon website, app and social channels. Velon's on-bike cameras featured unmissable action footage for fans to get into the heart of the races as well as additional cameras to capture unique behind-the-scenes access to the series and the teams. Consequently, fans benefitted from a much "closer and inside" experience of the competitions. To



Velon data that has been captured during cycling races for a "closer and inside" experience for fans.

15 2013



6 2004

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Viz Eclipse virtual overlay technology allowing TV audiences in various regions to all view different ads than those seen by the in-venue spectators.

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complement these more personal and engaging offerings, we always focus on integrating brands into content in a way that demonstrates how the sponsor's participation has helped enhance the fan experience.

Likewise, the more relevant the content, the more it resonates. A consumer is much more interested in something he actually wants and is locally available. By using Machine Learning, content can be localised and customized to help brands deliver their messages to the right audience, in the right language, in the right market – with minimal extra effort. For example, Infront and Vizrt's Viz Eclipse virtual overlay technology can replace advertising messages across LED perimeter boards on a football pitch, allowing TV audiences in various regions to all view different ads than those seen by the in-venue spectators. This allows a brand to insert targeted region-specific adverts into television feeds. Because the technology is self-learning, the overlay is seamless and improves over time, guaranteeing no intrusion on the viewing experience.

Finally, Artificial Intelligence can help streamline data analysis and track user engagement to help sponsors better deliver relevant content. By mimicking the fans that are consuming that content, we can anticipate what type of content is needed, liked and consumed. Likewise, Chatbots allow brands to connect directly with their customers in a value-added way. Fans get personalised messages and experiences and direct access to the content they desire, which encourages them to share with others, further amplifying the sport and the brand message. By integrating brand messages into these more targeted offerings, sponsors can see higher conversion rates and better return on their investments, because their messaging is customized to the exact target demographic.

By utilising digital technology to not just reach sports fans, but to better understand their needs, we can create win-win situations – consumers are able to connect with the content they want and brands can connect to their consumers in new and valuable ways.

FREE TRADE - WHERE ARE WE HEADING?

By **Edwin Vermulst**, WFSGI Trade Counsel and Partner, VVGB Advocaat & **Juhi Dion Sud**, Counsel, VVGB Advocaat

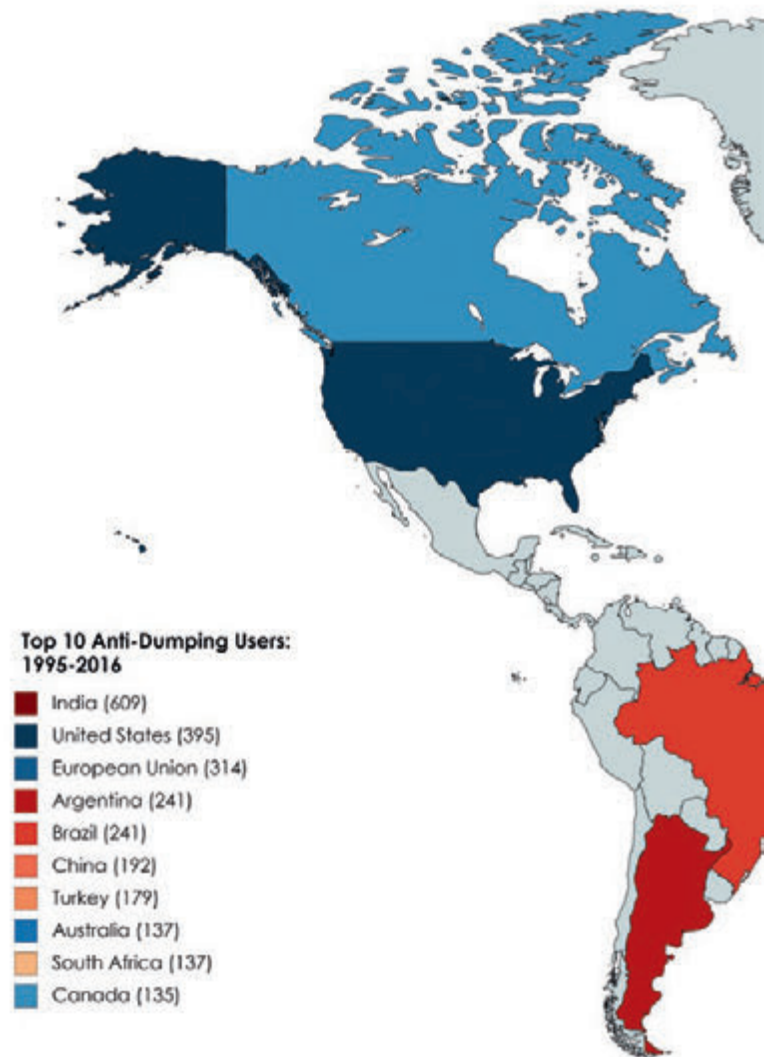


Over the past four decades, the trade canvas has witnessed an enormous shift from the mercantilist model to 'internationalization' resulting in global value chains. This changed approach has been accompanied by trading partners using different protectionist tools starting from tariffs to hybrid non-tariff barriers. Market liberalization has been the goal and will remain for the decades to come as protectionist tendencies are on the rise.

Globalization of trade over the past 40 years can be divided into roughly three phases. During the first phase, when the General Agreement on Trade and Tariffs in 1947 set the global trading order, developed countries took the lead in market liberalization by reducing tariffs while the developing countries kept their tariffs high. At the same time, the former used trade defence instruments to protect their markets.

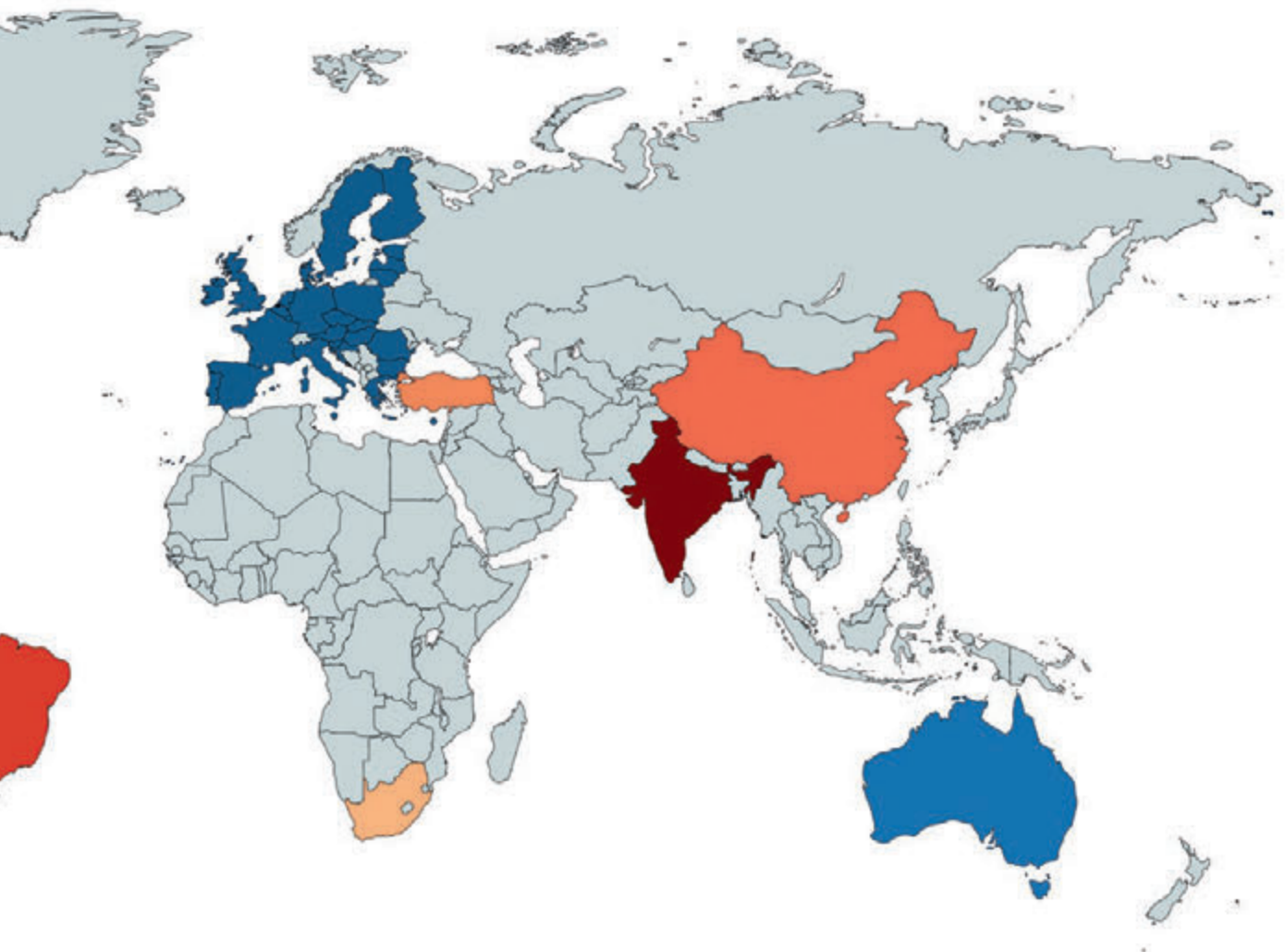
In the second phase, which started with the establishment of the WTO in 1995, there was a marked shift in the approach of the developing countries as they reduced tariffs and even signed up to plurilateral agreements like the Information Technology Agreement entailing tariff elimination. However, at the same time, developing countries like India, Brazil and Argentina among others, became prolific users of trade defence measures and are now the most important users of the anti-dumping (refer to the map) and safeguard instruments.

The past decade symbolizes the third phase wherein global trade underwent tremendous development with conventional import duties losing relevance due to increasing free trade agreements in addition to general tariff liberalization, and global value chains taking precedence. Countries like China, India and Indonesia became major production hubs for parts and components of manufactured products. In parallel, in addition to the traditional protectionist tools, non-tariff barriers increasingly gained prominence.



With developing countries taking the lead, now customs valuation thresholds, labelling rules, regulatory standards, customs clearance formalities, non-automatic import licensing and local content requirements forcing FDI are the most commonly used tools. This is in part because globalization brought in a wave of growth and development but behind the scenes various developing countries have been jostling to increase their share of the trading pie while mounting up the value-added chain.

Last, in light of the recent political events linked to the protracted effects of economic crisis and increasing overcapacities, even the developed countries have reverted to the increased use of traditional trade defence measures while reviving the non-conventional tools such as national security-based restrictions. Therefore, market access and continued trade liberalization has been and will remain a challenge for the years to come.





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ISPO – NETWORKED KNOW-HOW FOR BUSINESS SUCCESS

The sporting goods industry thrives on the exercise habits of consumers. Professional and recreational athletes alike are always on the search for innovations that offer greater convenience, safety and functionality. This continuous advancement also requires that the industry does not stand still and constantly works to redefine itself. Right now, it's expanding its universe. The business trend is called 'cross industry'. The sporting goods sector is looking at the bigger picture and integrating its know-how with complementary specialist knowledge from other branches of the economy. Of particular interest now is its tie-in with technology industries.

ISPO has adopted this trend in its own extensive range of platforms and services and provides ideal conditions for global, cross-industry integration. In doing so, ISPO is far more than a trade fair: ISPO is available to stakeholders, companies and consumers from all branches 365 days a year – as a service provider, observer of topics and trends, knowledge broker, and information platform. The year-round portfolio encompasses conferences, future-oriented competitions, specialist information, expert presentations, an international network of sports business professionals and consumers, and services designed specifically for the industry.

ISPO Academy follows along with the continuous changes taking place in the sports business. Vendors and retailers alike consistently find new inspiration for their business at the conferences, lectures and seminars that are held throughout the year. Experts from all industry sectors contribute their expertise and sharpen the focus on the sports industry of tomorrow. In addition to its own conferences, ISPO Academy also offers a wide range of resources online: Studies, articles, e-learning seminars and web lectures form the basis for a cross-industry dialog. ISPO Academy was a sponsor of the WFSGI World Manufacturers Forum: During productronica, the world's leading trade fair for the electronics development and production from November 14 to 17, 2017, in Munich, the Forum was a stage for future-oriented topics in the sports business. Guests included speakers from the automobile and electronics industry. They highlighted ways for manufacturers to take their businesses into a digital and automated future.

The independent online platform **ISPO Open Innovation** brings together companies and customers during the product development stage and sets new standards for their communication. Manufacturers can present their innovations and align their ongoing processes with the preferences and expertise of the consumers. More than 36,000 international consumer experts registered in the ISPO Community are able to interact with the brands and provide useful impulses. The community provides important insight and serves as the trend barometer for the entire sports industry.

This direct contact is the cornerstone for new ideas. During **ISPO Munich**, guided tours connect innovators from the sports industry with representatives of other sectors. In keeping with the trend, a Cross Industry Walk thereby picked up on the topic of printed electronics: In the future, washable and flexible sensors and mini-batteries will be manufactured into functional sportswear or sports equipment. They will measure physical functions, link technologies and be controlled via mobile apps.

It is not unlikely that the new topics will also bring new professionals into the arena. The **ISPO Job Market** is the most prominent job exchange for the sports business. With an international scope and major names such as adidas, The North Face and Vans, experienced professionals and lateral entrants alike can quickly find a new challenge.

As a service provider, event organizer and partner, ISPO supplies the sports industry with a comprehensive range of products and services around the clock. ISPO.com provides daily updates on news from the sports world and addresses relevant industry highlights and current developments in background reports and interviews. As a full service partner, ISPO thus follows along with changes that take place in the sports industry and supports the sector on its path into the future with comprehensive, competent and always current resources.



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The World Federation of the Sporting Goods Industry supports and inspires your business. The WFSGI is the world authoritative body for the global sporting goods industry. Our purpose is to represent and inspire the industry, to invest in innovation, promote physical activity, support free trade and do business in an ethical and sustainable manner. As part of our mission, we facilitate communication and cooperation to enhance competitiveness and innovation. We seek to positively influence the way our products are manufactured, with a focus on people involved in the manufacturing and the environment. Our members steer the direction of the industry. The future of the sporting goods industry begins with the professional networks that we support.

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BICYCLE COMMITTEE

ACTIVITY REPORT 2017

Represent leading brands on all levels (sport, trade, social and environmental issues), also the voice of the bicycle industry towards the Union Cycliste Internationale (UCI), the International Triathlon Union (ITU) and the International Olympic Committee (IOC).





It has been an eventful year for the bicycle industry with the first ever Tour de France stage victory on a disc brake equipped bicycle by Marcel Kittel of Germany, UCI leadership change with David Lappartient as the new President, as well as the first ever World Cycling Forum organized by WFSGI in cooperation with Bike Europe. The Bicycle Committee is the central vocal point for the bicycle industry and has continued extensive collaboration with the UCI and other stakeholders on a range of technical topics, such as, disc brakes, aerodynamics, weight limitation and wheel approval procedures.

Disc brakes in road racing

2017 marked the first uninterrupted season-long trial for disc brakes in road racing. In 2018 the disc brake trial is going to continue under the same conditions as in 2017. WFSGI has been part of the UCI Disc Brake Working Group along with AIGCP (Association Internationale des Groupes Cyclistes Professionnels) and CPA (Cyclistes Professionnels Associés) to review and react on all developments concerning disc brakes in road racing. WFSGI will continue to work with all stakeholders to develop a roadmap for permanent introduction of disc brakes in road racing.

Wheel Committee

Since the first introduction in January 2016, the Wheel Impact Test, that was developed by WFSGI members in collaboration with the UCI, has become widely accepted and used industry wide. In 2017 the Wheel Impact Test for composite wheels has been included in the CEN Technical Report and therefore is another step closer to the main objective of being included in ISO 4210, international standard for bicycles. The Wheel Committee has also taken proactive steps to engage in development of tyre and rim compatibility standards which include cooperation with many WFSGI members as well as external stakeholders.

Saddle Committee

The Saddle Committee has identified saddle setback regulation as well as unification of saddle reference points and sizes as areas for deemed rule and regulation change. The Saddle Committee will be the central body to unite the saddle manufacturers and bring these topics into a discussion with the UCI and other stakeholders.

Working Group Aerodynamics and Weight Limitation

The Aerodynamics and Weight Limitation Working Group has successfully continued to develop proposals that are aligned with UCI's open approach to consider benefits of adding more safety based standards. The Working Group's proposal to adopt ISO safety standards for frames, forks, handlebars and stems has been accepted by the UCI Management Commission in June 2017 and will become active as of January 1, 2019. The Working Group has identified further areas where rule modifications are deemed necessary in order to encourage innovation and will continue to develop proposals for rule modification to foster progress in this direction.

Liaison with ISO TC31, TC149 and CEN TC333

WFSGI is continuously following bicycle standards and regulations related developments at ISO and CEN level. Wide range of technical topics discussed at different ISO and CEN groups allow WFSGI to have comprehensive oversight of the latest developments in cycling industry and hence update its members accordingly, to give sufficient time to react to the proposed changes. It is imperative to ensure that various stakeholders that are developing standards at different levels are harmonized in their approach to ensure overall industry development.



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World Cycling Forum

In June 2017 WFSGI and Bike Europe organized the first ever World Cycling Forum in Porto, Portugal. Close to 200 high-level participants from 23 countries attended the conference that was aimed to explore topics related to consumer centricity and increasing speed to market. The 2-day conference featured 11 keynote speakers and received superb feedback from the attendees and therefore the second edition of the event is scheduled to take place in 2019.

Outlook/forecast 2018

The Bicycle Committee will remain in close contact with the UCI to establish grounds for successful collaboration under the new UCI leadership. WFSGI will continue to work with the UCI on the development of rules and regulations in the identified priority areas. With millions of consumers and ever-increasing number of professional cyclists on disc brake equipped bikes, rules and regulations in this field are likely to be a central topic in 2018. Furthermore, following the current trends and deemed changes that would allow more innovation, aerodynamics and weight limitation regulations are likely to be re-discussed.

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COMMITTEE ON INTERNATIONAL SPORTS ORGANIZATIONS

ACTIVITY REPORT 2017

Represent the World Federation of the
Sporting Goods Industry as the
industry consensus voice to all sports
federations and organizations.



In 2017 the focus of the Committee's work was on the preparation of the PyeongChang 2018 Winter Olympic Games, and the different sport specific working groups grew and engaged with their relevant stakeholders to foster the development for a successful future of the respective sports and events.

Relations to the International Olympic Committee (IOC) and the Olympic Family

The Memorandum of Cooperation (MoC) between the IOC and the WFSGI, signed on June 2, 2016 at the Olympic Museum in Lausanne, is an overarching framework that strengthens the relationship between the sporting goods industry and the Olympic Movement. WFSGI worked closely with the IOC to further develop specific areas of collaboration. An annex to the MoC was signed on October 10, 2017 during a meeting between the WFSGI and IOC in Lausanne.



On May 2, 2017, IOC President Dr. Thomas Bach and WFSGI President and CEO Robbert de Kock met to discuss future cooperation: How to support physical activity, how to continue to support the smaller NOCs, how to support standards and compliance through the WFSGI Responsible Sport Initiative (RSI) and how to improve industry collaboration and conditions.

Rule 40 – Advertisement guidelines

The IOC allowed for Rio 2016 generic (non-Olympic) advertising during the period of the Games based on certain conditions. The same rule was applied for PyeongChang 2018: Advertising by participants' sponsors - which are not Olympic sponsors - may take place during the period of the Olympic Games. (1) NOCs may decide to restrict or prohibit generic advertising subject to territory's applicable laws and regulations, (2) the advertising must not create any impression of a commercial connection with any Olympic property and in particular the Olympic Games, and (3) applications to advertise must be submitted for approval to the NOC or IOC. WFSGI and the IOC co-organized webinars for different time zones

regarding the advertising activities during the period of the Games on September 7, 2017. WFSGI compiled all information in a practical guide: "Advertising Around the Olympic Games - What You Need to Know as a Sporting Goods Brand".

Rule 50 – Manufacturer identification

PyeongChang 2018 followed the improvements of the branding guidelines for Rio 2016 and facilitated the daily work of the brands as it ensured in many cases that athletes were able to use the sport equipment as they are used to during the season. The further development of the rule will be reviewed for Tokyo 2020.

Uniform Support Programme for the 2018 PyeongChang Olympic Games

Building on the success of the first ever National Olympic Committees (NOCs) Uniform Support Programme for the 2016 Rio Olympic Games, the IOC, in collaboration with the WFSGI, extended the programme to the upcoming 2018 PyeongChang Olympic Winter Games. 18 National Olympic Committees from four continents were provided with free competition clothing. Through the combined work of the participating NOCs and six of the world's leading sports brands that are involved in the programme, they have been designing and developing the uniforms to be worn by 53 athletes during the Games.

Aquatics Committee

Officially formed in 2015, the Aquatics Committee represents the leading swim wear brands and is an active expert group. The Committee provides a strong and unifying voice for our industry, with the common goal of developing, advancing and promoting aquatic sports and activities. Currently on the agenda is standard development for aquatic eyewear, physical activity promotion and swimming growth, chemicals management and representation and connection of members with the sport's governing body.

Recent rule changes in open water swimming events have raised concerns from the open water swimming community. The WFSGI conducted a survey on behalf of the Committee member brands with the aim of gathering further information on the effects of this rule change to service the athletes and most





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Anything Is Possible



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importantly to protect the welfare of athletes. The feedback was compiled in a report that is representative of elite athletes and coaches, providing a clear indication of general sentiments and concerns and proposes potential solutions to protect athletes from cold water exposure with appropriate and functional equipment yet still provide a safe and fair competitive environment.

Badminton Working Group

The Badminton World Federation (BWF) and WFSGI organised the second Badminton Sporting Goods Brands Meeting on December 15, 2017 in Dubai, coinciding with the BWF Superseries Finals. The full day meeting consisted of two parts: an internal meeting with the key badminton sporting goods brands coordinated by WFSGI (members & non-members) followed by a dialogue between BWF and the industry and networking opportunities.

Helmets, Goggles, Gloves, Arm/Leg Protection & Poles Working Group

The Working Group met in 2017 with the International Ski Federation (FIS) on various occasions to consult with FIS and brands on commercial markings and provided points for discussion to tackle challenges the industry faces. Mutually, a first improvement was achieved with regards to the commercial markings and strap size of goggles. Further discussion took place between the UCI (International Cycling Union), ITU (International Triathlon Union) and FEI (International Equestrian Federation) on rules of the different sports concerning protective gear and eyewear.

Other relations to IFs & sport organizations

The WFSGI Pledge for the FIFA Quality Programme is a support platform that works on a day-to-day-basis to build a better work place and the right quality standard for football. WFSGI especially thanks our relations to the IF's and in particular the BWF, FIFA, FEI, FIS, IAAF, ITU, UCI, and WR (World Rugby), but also the IOC and IPC (International Paralympic Committee), for their good cooperation and we wish them a fantastic 2018.

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A person is running through a forest, captured in a side profile view. The runner is wearing a light-colored t-shirt with a dark stripe on the sleeve, dark shorts, and running shoes. The forest is dense with trees and foliage, and the entire image has a green tint. The text is overlaid on the upper left portion of the image.

CORPORATE RESPONSIBILITY COMMITTEE

ACTIVITY REPORT 2017

Develop and promote an understanding within the World Federation of the Sporting Goods Industry about the relevance of global societal, social and environmental trends like climate change, resource depletion, labor and health issues.



In 2017 the CR Committee followed on three programmatic key commitments: (1) the finalization and publication of all Position Papers on critical CR issues. (2) The further amendment of the Communication on Action (CoA) reporting mechanism. (3) Strengthening the information exchange amongst the different industry stakeholders.

Position Papers on critical CR issues

The CR Committee has finalized its work on the last CR Position Papers. All Papers have been shared with the WFSGI constituency. For each of the Papers a separate webinar has been scheduled to give members the chance to raise questions and exchange views with the topical experts. In addition, best practice case studies complemented the research and topic presentation given during the webinars. All webinars have been recorded and are available to WFSGI members on the website's Members Download Center.

The Papers covering the following topics are available:

1. Climate Change
2. Wages
3. Non-Financial Disclosure
4. Product Safety and Compliance
5. Raw Material Sustainability
6. Working Hours
7. Workplace Health and Safety
8. WFSGI Code of Conduct Application
9. Chemical Safety
10. Human Rights and Sustainability at International Sports Events
11. UN Guiding Principles on Business and Human Rights
12. Factory Closures and Downsizing
13. Migrant Workers

Beside the actual Position Papers, the WFSGI CR Committee has elaborated a framework document outlining the purpose and context of this project. Furthermore, an overall executive summary of all the Papers has been issued and made available to all members.

As a next step of the new communication strategy on critical CR issues, the WFSGI shared the finalized Position Papers with different International Organizations such as the ILO, IOE, OECD, etc.

Communication on Action

The CR Committee was mandated by the WFSGI Board to finalize the CoA project that is targeted to strengthen advanced disclosure about corporate CR practices and to promote the

Code of Conduct compliance within the WFSGI constituency. In 2017, the WFSGI CR Committee and the WFSGI Board offered an additional incentive to WFSGI members to report on the Code of Conduct implementation progress. The WFSGI will publish a list of all WFSGI members on its website and highlight the members who have submitted their CoA reports. The decision whether the CoA report itself will be published, remains with the individual WFSGI member.

In addition, some WFSGI CR Committee members volunteered to offer a CoA report review upon request of WFSGI members. In so doing the more experienced companies share their expertise with companies who are starting with their reporting and disclosure efforts.

Hard Goods RSL

While the Position Paper on chemical safety was introduced to members, the request was made to collaborate on a harmonized restricted substances list for hard goods. The WFSGI CR Committee has taken up this request and offered these companies a liaison with the AFIRM group. The WFSGI has exchanged views with AFIRM and participated in their meeting in 2017. As a result, a gap analysis form was created and shared with WFSGI members. WFSGI members were invited to attend the AFIRM meeting in 2017 in order to further evaluate how chemicals, materials and products relevant to hard goods could be covered by the AFIRM RSL.

Climate change and science based targets

Given the increasing importance of science based target setting to measure and mitigate the impact of companies on climate, the WFSGI CR Committee facilitated an initial elaboration and discussion on this subject. In its annual meeting, the WFSGI CR Committee invited the WRI – World Resource Institute to get a comprehensive presentation of the subject. Members shared their approaches and efforts made in this context.

Human rights at mega sports events

A first exchange of information with the IHRB on human rights at mega sports event took place followed by the WFSGI CR Committee's decision to request the WFSGI Board to formally endorse these principles. After that the WFSGI Board decided to formally sign up these principles. WFSGI organized a webinar for members to learn more about the IHRB Sporting Chance Principles on Human Rights in Mega-Sporting Events and made comprehensive information on the initiative available.





Outlook/forecast 2018

Key activities the CR Committee intends to implement in 2018 are: to proceed with the dissemination of the Position Papers and to work with AFIRM on a harmonized RSL for hard goods. The CR Committee will evaluate the further progress of the CoA project, and report back to the WFSGI Board. Furthermore, the Committee will continue to screen important developments in the CR and sustainability agenda and share tailored updates with their members.

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LEGAL COMMITTEE

ACTIVITY REPORT 2017

Facilitate and enhance the interaction, information exchange and co-operation between the World Federation of the Sporting Goods Industry members on the latest international legal developments within the sporting goods industry.





2017 was a pivotal and extremely busy year for the Legal Committee, yet foremost both exciting and rewarding. Special emphasis was placed on the effective implementation of initiated projects, while keeping on top of developments in the legal field. Once again, the Legal Committee members have shown excellence, enthusiasm and dedication in the tasks entrusted, developing pragmatic solutions and lending a hand to WFSGI members in their daily business.

The Annual Meeting, which was held on June 27, 2017 in Portland, USA at the global headquarters of Nike provided an additional opportunity to learn about the multiple achievements of the Committee but also to delve deeply into very actual vibrant legal trends by collecting inspirational thoughts from other sectors 'high-level experts.

A tailor-made solution to facilitate the labelling of sport products - WFSGI Labelling Database

Further positive steps have been made towards the building of the WFSGI Compliant Labelling Requirements (CLR) Database. Negotiations proceeded towards an agreement granting exclusivity of the Database to the sporting goods sector. Parallel to this, the designing phase of the Database started with the primary purpose of addressing WFSGI members specific expectations. According to current forecasts, the customized database will be operational within a nine-months delay (from November/December 2017). For the record, the Labelling Database will deliver actionable information on global labelling requirements covering forty-nine countries at present and six product categories (i.e. apparel, footwear, sporting equipment, personal protective equipment, traditional/e-bicycles, electronics) enabling sport brands to benefit from significant economies of scale by contributing to considerable time and cost savings.

A wide range of possibilities to protect intellectual property rights (IPR) online and offline

Connect rapidly with trusted investigators - WFSGI IP Contacts Database

Recognizing that there was a business risk to work with ineffective investigators and admitting that finding reliable private eyes was often done by trial and error rather than in a structured manner, the Committee members agreed to join forces to develop the WFSGI IP Contacts Database which contains the contact information of worldwide trusted investigative agencies/agents recommended by WFSGI members. The supreme goal is to create confidence and trust between the WFSGI members and ultimately provide a suitable

tool cooperation for future joint enforcement operations. The data bank has been further updated on a periodic basis and discussions have been recently initiated to explore additional potential and complementary avenues for cooperation with identified trusted investigators (and online platforms).

Benefit from the World Customs Organization's advices and Experience - IPM tool

With the objective to significantly decrease the quantity of counterfeiting of WFSGI members products, the WFSGI is continuing its collaborative partnership with the World Customs Organization (WCO). Among other things, the WCO offers WFSGI members the possibility to use its IPM tool at very favorable conditions. This web based mobile platform allows brands operational data to be communicated directly to Customs Officers, facilitating the identification of counterfeit goods.

Make an industry effort to explore the leading-edge solutions for counterfeit detection and product authentication

Research is currently underway to identify the best technical solutions available on the market for counterfeit detection, product authentication and tracing of tracking of products within the supply chain in general. These tools and solutions against counterfeiting consist in incorporating features (i.e. tracers including hologram sticker, invisible or digital markers, RFID chips, IT based solutions, etc.) in genuine products (including the packaging) to obviously distinguish them from fakes. A benchmarking is presently being conducted to help WFSGI members identifying and selecting an appropriate system to protect their products.

Being supported by key partners to better fight online brand abuses

The World Federation of the Sporting Goods Industry continues its highly successful and widely adopted project to collaborate with the Italian service provider, Convey Srl. to offer its members a variety of services to combat rogue websites which sell counterfeit goods.

A concrete answer to anti-bribery & anti-corruption (ABC) concerns with the sporting goods industry

A dedicated task force put a lot of thought, energy and effort in working on the ABC subject with the aim of aligning with the long-term objectives and alternatively providing detailed guidance and training to WFSGI members on this very timely issue in society today.



>

A closer look at the digital world & its legal implications – WFSGI-FESI Joint Working Group

Through a joint working group, the WFSGI and the Federation of the European Sporting Goods Industry (FESI) together pursued their advocacy efforts and legal monitoring of European policies which were adopted by the EU Commission in the context of the European Digital Single Market Strategy in May 2015. The Working Group is currently focusing on four policy areas which could potentially have an impact on the Sporting Goods Industry and the way they sell products online: geo-blocking, results and consequences of the EU Commission's e-commerce comprehensive sector inquiry carried out in 2016, and the role of the online platforms and the Audiovisual Media Services Directive.

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A low-angle, upward-looking photograph of two children climbing a rope-based play structure. The child in the foreground is a young girl with dark, curly hair, smiling broadly at the camera. She is wearing a dark shirt and is reaching up to grasp a rope. Behind her, another child with light-colored curly hair is also climbing, looking down with a smile. The structure is made of thick, dark ropes and wooden beams, creating a complex web of lines against a bright, yellowish background. The entire image has a warm, golden-yellow tint.

PHYSICAL ACTIVITY COMMITTEE ACTIVITY REPORT 2017

Promote physical activity on a global level. Foster and encourage the participation of citizens of all countries in healthy sporting activities.



Today's global population is the least active in history. Currently, physical inactivity accounts for an estimated \$67 billion - \$145 billion in annual health costs and lost productivity, and contributes to increased rates of morbidity and mortality. Moreover, physical inactivity has shown to play a role in decreased levels of academic achievement and mental wellbeing. Yet, there are encouraging signs from the international community that demonstrate an increased recognition of the critical role physical activity plays in creating a healthy society; this is an important step, and public and private sector organizations are responding by supporting initiatives to address this global epidemic.¹

Mission

The WFSGI Physical Activity (PA) Committee's mission is to promote physical activity and sport as a sustainable solution for a healthier society. WFSGI members bring this mission to life through investing in increased physical activity and sports participation all around the world, utilizing the unique assets of the sporting goods industry to drive impact at local, regional and global levels of society.

The WFSGI PA Committee coordinates the industry's joint response to the global physical inactivity epidemic by focusing on the following areas:

- Supporting global, regional & national level advocacy work to promote physical activity and sport.
- Working with UN Agencies & other multi-lateral organizations to prioritize physical activity on the global development agenda.
- Providing a global forum for members to share best practices & lessons learned on approaches that increase participation in sport and physical activity.

A clear, powerful position

Last year, the PA Committee leadership sought to elevate and promote the issue of physical activity on the global agenda in a number of ways. First, the Committee worked with WFSGI members to develop an industry position paper that captured and expressed the high priority member organizations place on the issue of physical activity, and the range of initiatives that are underway to promote active lifestyles for children and adults around the world.

The position paper articulated WFSGI's firm commitment to addressing and reversing trends of physical inactivity through raising awareness of the benefits of physical activity and sport, as well as increasing levels of physical activity and sports participation (especially among children). The paper outlined a

number of opportunities for collective action, including improved sharing of best practices and industry-led advocacy to inspire employees, clients and the general public to take action in support of more active, healthy lifestyles.

Contributing to global dialogue and action

World Health Organization (WHO): Advancing collective efforts to promote physical activity

WFSGI has continued to engage with WHO across multiple efforts, including most recently the drafting of a Global Action Plan for Physical Activity 2018-2020 (GAPPA). The WFSGI submitted public comments for the drafting phase of the GAPPA, focusing on the unique role the private sector may play in advancing many of the strategic objectives of the plan. The proposed global action plan builds on previous WHO strategies and plans, including the Global Action Plan for the Prevention and Control of Noncommunicable Diseases, where the WFSGI PA Committee supported such efforts through submitting evidence to inform strategic planning.

UNESCO: Global physical education policy

WFSGI is a member of the UNESCO's Intergovernmental Committee for Physical Education and Sport (CIGEPS)

The CIGEPS Committee supported UNESCO to develop the Sixth World Conference of Ministers of Sport and Senior Officials Responsible for Physical Education and Sport, (MINEPS VI). Since the previous MINEPS Conference in 2013, UNESCO (supported by WFSGI) has made significant progress in reforming Physical Education and Sports Policy. The 2017 Conference took place in Russia, and provided an opportunity to inspire governments to prioritise physical activity, physical education and sport in schools. WFSGI Physical Activity Committee was represented at the meeting by its Chairwoman, Vanessa Garcia-Brito, who advocated for more emphasis on getting children active in schools around the world.

Looking ahead

As WFSGI celebrates 40 years of representing and inspiring the sporting goods industry, the PA Committee is looking ahead to drive meaningful action in the fight to reverse trends of physical inactivity globally. The PA Committee's leadership will seek to



1. The World Health Organisation (WHO) recently launched a public consultation process to develop a Global Action Plan for Physical Activity 2018-2020 (GAPPA). This is a strong indicator of the increasing importance of Physical Activity on the global development agenda. http://www.who.int/ncds/governance/gappa_version_4August2017.pdf

> implement the commitments laid out in the group's position paper. To date, the Committee has developed a request for proposals to better understand the opportunity to launch a communications campaign to promote active lifestyles at scale. The Committee will seek to review and understand how this effort may be advanced in the coming year. Also, in an effort to share knowledge and improve the collective impact of individual company initiatives, Committee members have developed and shared case studies on programs in Brazil, South Africa and more, detailing the learnings that may be incorporated into other programming as well as WHO toolkits to promote health and physical activity in countries around the world.

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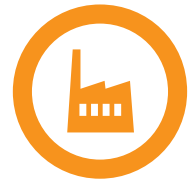


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MANUFACTURERS COMMITTEE ACTIVITY REPORT 2017

A hub for manufacturers and manufacturing issues. The World Federation of the Sporting Goods Industry works on joint approaches to tackle common challenges and to identify key issues.



The Committee is a platform for manufacturers and manufacturing issues to exchange and seize new opportunities. The members derive value through collaboration and on the agenda are the following topics: Supply chain challenges, open source auditing/ Responsible Sport Initiative (RSI), platform for the exchange of ideas and their conversion into action, and the future of sourcing – destinations, directions & sourcing strategies.

WFSGI World Manufacturers Forum 2017

The World Manufacturers Forum was initiated and launched in 2013 by the WFSGI's member brands and manufacturers. Ever since it has been the WFSGI's goal to be geared to meet the needs of the sporting goods industry in times of digitalisation and automation.

This year's two-day Forum was held in November in Munich, Germany, and provided an excellent mix of high calibre academic knowledge, practical input and concentrated presentations from industry leaders. A carefully selected keynote speaker line-up drawing from academics, consumer-goods, electronics and other sectors, presented on how to be moving on to a digital and automated business of the future.

Academics gave insights on how smart analytics technologies can improve productivity and how electronics can be integrated into a wide range of products in the manufacturing process. The round-table talks, a future workshop and a joint dinner with productronica sparked discussions and allowed for the audience to foster cross-industry exchange and different viewpoints on how to move on to a digital and automated business of the future.

All participants were given the exclusive opportunity to attend a tailor-made guided tour around productronica – the world's leading trade fair for electronics development and production. The tour options included pick-and-place machines, automation and innovation. The Forum was attended by 160 executives from more than 20 countries.

The WFSGI thanks its hosts and partners for their generous support, which made the World Manufacturers Forum 2017 possible

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TRADE COMMITTEE ACTIVITY REPORT 2017

Address international trade issues facing the global sporting goods industry. Monitor and engage with governments involved in bi-lateral and regional free-trade agreement negotiations, build together with national sporting goods federations strong relationships with the relevant administrative authorities in the government.



Throughout 2017 the WFSGI Trade Committee continued to advocate for free and fair trade for the sporting goods industry. These endeavours included the annual industry internal information exchange on international trade measures of relevance to the sporting goods industry and also, hosting a session at the WTO Public Forum “Trade Behind the Scenes”. In addition, this year the WFSGI Trade Committee undertook a trip to Asia to meet with different government representatives.

Debrief Brazilian anti-dumping case against footwear imports from China

In 2016 the WFSGI Trade Committee actively engaged in the review of the Brazilian anti-dumping measures on imports of Chinese footwear. This was so far, the most important trade case where the WFSGI Trade Committee engaged in a very proactive manner. 2017 was initiated with a first WFSGI Trade Committee meeting devoted to debrief on this trade case and ensure that the valuable experiences gained through this engagement are made available for future trade activities under the WFSGI umbrella.

WFSGI Trade Committee delegation's visit to Asia

In 2017 a delegation representing 7 WFSGI brand member companies jointly visited government representatives at a ministerial level. The delegation had meetings over several days with different ministries in both Indonesia and Vietnam and also with the European embassy in Vietnam. During these visits, the delegation stressed the importance of the countries for both sourcing and as a market. The delegation outlined the importance of keeping these sourcing markets attractive and how trade measures on a global level can have an impact on these markets.

WFSGI representation during the WTO Public Forum “Trade Behind the Scenes”

Once more, the WFSGI Trade Committee worked on a proposal for hosting a session at the WTO Public Forum 2017. This year's WTO Public Forum focused on Trade Behind the Scenes. The WFSGI Trade Committee decided to provide the sporting goods industry perspective by inviting the following speakers to its panel:

- Mr. Petros C. Mavroidis, Edwin B. Parker Professor of Law, Columbia Law School, NYC
- Ms. Marina Carvalho, President, APICE (Brazil)
- Mr. Marc-Ivar Magnus, Vice President, CR, Legal and Trade, WFSGI
- Mr. Jeffrey Whalen, Senior Counsel, Customs and International Trade, Nike Inc.

The session hosted a glimpse behind the scene into the practical impact of trade for a truly globalized sector such as the sporting goods industry. The session's focus was on trade facilitation, highlighting the opportunities trade offers but also the challenges that arise for private businesses operating in a globalized world with a global value chain.

Outlook/forecast 2018

In its last meeting in 2017, the WFSGI Trade Committee decided to evaluate the possibilities of reassessing the scope of the topics covered by this Committee. For this purpose, an alignment with other WFSGI Committees such as the Legal Committee will be necessary. By reviewing the mandate of the WFSGI Trade Committee the latter wants to ensure that structural and organizational development within the WFSGI member companies are taken into account and that the Committee remains open for WFSGI members representatives covering trade relevant working areas.

The WFSGI Trade Committee will continue to monitor entry into force and implementation of different free trade agreements in order to evaluate their impact on the SGI. As always, the Committee will assess any possible upcoming trade cases and how the industry can proactively engage.

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INDUSTRY SUPPLIERS

3T Cycling Srl

7 For all mankind (VF Corporation)

Accell Group

Accell Bisiklet (Accell Group)

adidas

Advanced Sports Inc.

AeroDesign

Akay International

Alberta Sports (PVT) Ltd.

Ali Trading Co., (Pvt.) Ltd.

Anomaly Action Sports

Anta Sports Products Limited

Apache Footwear Ltd.

Aptonia (Decathlon)

Aravon (New Balance)

Arena Italia SpA

Argon 18

Artengo (Decathlon)

Artful Dodger (Iconix Brand Group)

Asics Corp.

aspiria-nonfood GmbH

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Augusta Benelux BV (Pon.Bike Group)

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Batavus (Accell Group)

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Bellwether

Berghaus (Petland)

Bike Parts (Accell Group)

Bladerunner (Tecnica)

Blizzard Sport (Tecnica)

BMC Switzerland AG

Bongo (Iconix Brand Group)

Bontrager (Trek Bicycle Corporation)

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Breezer (Advanced Sports)

Brine (New Balance)

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Brooks Sports Inc.

B'Twin (Decathlon)

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Buffalo David Bitton (Iconix Brand Group)

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Butterfly (Petland)

Caloi (CSG)

Campagnolo SA

Candie's (Iconix Brand Group)

Cannon (Iconix Brand Group)

Cannondale (CSG)

Canterbury (Pentland)

Canyon Bicycles GmbH

Caperlan (Decathlon)

Capital Sports Corp. (Pvt.) Ltd.

Carraro Cicli (Accell Group)

Cervélo Cycles (Pon.Bike Group)

Charge Bicycles (CSG)

Charisma (Iconix Brand Group)

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Chung Ah Athletic Wares Fty.

Chung Jye Shoe Co. Ltd.

Cicli Pinarello Spa

Cobbhill (New Balance)

Colnago Ernesto E.C. Srl.

Columbia Sportswear

Comet (Accell Group)

Comet Sports (Pvt.) Ltd.

Converse (Nike)

Corima (Look Cycle)

Cosco (India) Ltd.

Craftsman Ltd.

Crankbrothers (Selle Royal Group)

Currie Technologies (Accell Group)

Cycle Service Nordic (Accell Group)

Cycling Sports Group (Cannondale, Dorel Industries)

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Decathlon

Delux Sports Company

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Diamondback (Accell Group)

Dickies (VF Corporation)

Dolomite (Tecnica)

Domyos (Decathlon)

Dong Luc Joint-Stock Company

DT Swiss AG

Dunham (New Balance)

Dynatour (Intersport)

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Eclat BMX (CSG)

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Energetics (Intersport)

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etirel (Intersport)

F.C. Sondhi & Co. (Pvt.), Ltd.

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Fieldcrest (Iconix Brand Group)

Finis

Firefly (Intersport)

fi'zi:k (Selle Royal Group)

Focus (Pon.Bike Group)

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Fouganza (Decathlon)

Freesport Corp.

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FSA (Fullspeedahead)

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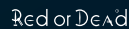
Inesis (Decathlon)

Iron Horse Bicycles (CSG)

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ASGA - Australian Sporting Goods Association

CSGF - China Sporting Goods Federation

FESI - Federation of the European Sporting Goods Industry

JASPO - Association of Japan Sporting Goods Industries

SCCI - The Sialkot Chamber of Commerce

SFIA - Sports & Fitness Industry Association

SGEPC - Sports Goods Export Promotion Co.

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Lewis Hamilton

