

# THE B.O.S.S. REPORT

THE BICYCLE, OUTDOOR, AND SNOW-SPORTS TRADE NEWSLETTER

WEEK 0701

© SPORTSONESOURCE, LLC

JANUARY 1, 2007

## The Week's Top Stories

- **Consolidators** catch their breath in 2006... (Page 1)
- **Integration** is the theme of the year... (Page 2)
- **Vendor-owned retail** becomes more prevalent in 2006... (Page 3)
- **2006:** the top stories that never happened... (Page 3)
- **OIA & ROI** have a busy year... (Page 4)
- **Industry Trade Groups** gain ground on Capitol Hill... (Page 4)
- **VF Outdoor Coalition** to acquire Eagle Creek... (Page 5)
- **Execute Sports** to divest SnowSports brands... (Page 5)
- **American Skiing Company** to sell Steamboat... (Page 5)
- **Other Stories** include Camelbak, Ibex, Scarpa, Yakima, Ahnu, Keen, and many more...

## Outdoor Market Sees Acquisitions Slow in 2006...

**A Happy  
New  
Year!**

This year could easily be looked at as four quarters of integration. The massive, blockbuster acquisitions of 2004 and 2005 forced many of the serial consolidators to take a step back and start to put the pieces of their new puzzle together in the most efficient manner. Because of this, there were really no big strategic deals during 2006, although several private equity firms still remained active in the Bicycle, Outdoor, and SnowSports market. The industry also made significant headway in its government relations efforts, with some major victories in resource preservation and trade issues for OIA, SIA, and Bikes Belong.

Out of all the players in the consolidation of the hardgoods industry, most would agree that **K2, Inc.** started this most recent wave of blockbuster deals with the Volkl, Marker, and Marmot triple play in 2004. This deal was integrated over the course of 2005, and now it appears KTO has a bit of a head start on its competitors. In fact, the company may have already sent a signal that it is ready to begin expansion again with the acquisitions of **Line, Karhu, and Sevylor** this year.

The biggest deal of the year happened when **Easton Sports** was acquired by **Riddell-Bell Sports** for roughly \$300 million to form **Easton Bell Sports**, a half-billion dollar holding company that is active in the bicycle, ski, snowboard, outdoor, and team sports markets.

**Quiksilver** has finally pulled **Rossignol** into its corporate culture and posted some strong results in Q3, but has yet to send out any indication that it is ready for another big deal. The company still has a ways to go with the integration and expense cutting process, but it is pulling things together ahead of schedule.

**Amer Sports** continues to struggle with the **Salomon** integration, with late deliveries hurting third quarter results, but Roger Talermo and his team were able to methodically cut the inefficiencies out of the supply chain and make some major strides towards profitability during the year. The company achieved its goal of becoming the largest sporting goods equipment company in the world, but still has a long road ahead before it becomes as efficient as it needs to be.

Continued >>>

## Market Report

Index	12/29	12/22	+/-
<b>BOSS</b>	1,647.59	1,647.97	0.0%
<b>Vendors</b>	1,624.64	1,626.10	-0.1%
<b>App/FW</b>	1,703.83	1,696.72	0.4%
<b>Hardlines</b>	1,584.15	1,579.38	0.3%
<b>Retail</b>	1,810.38	1,821.56	-0.6%
<b>SEW</b>	1,490.16	1,492.02	-0.1%
<b>S&amp;P 500</b>	<b>1,415.30</b>	<b>1,410.76</b>	<b>0.3%</b>
<b>Dow Ind.</b>	12,463.1	12,343.2	1.0%

## Market Movers

Company	12/29	12/22	+/-
<b>Quiksilver</b>	15.75	15.21	3.6%
<b>LaFuma</b>	60.80	59.15	2.8%
<b>Orange 21</b>	4.93	4.80	2.7%
<b>Big 5 SG</b>	24.42	23.79	2.6%
<b>Zumiez</b>	29.54	30.01	-1.6%
<b>Head NV</b>	3.70	3.79	-2.4%
<b>Shimano</b>	21.87	22.58	-3.1%
<b>Gandr Mtn</b>	9.03	10.10	-10.6%

## As Integration Becomes the Theme...

So 2007 should be a major turning point for the company as Salomon is completely folded in and it may be able to start looking for new brands. Consolidating all Winter Sports brands under one chief based in Utah will surely help pull the project together.

**Rottefella** also acquired a majority stake in **NAXO** this year, signaling the possible beginning of a consolidation cycle in telemark and AT. As Black Diamond keeps growing and adding to its R&D department, some of the smaller players in the market will have no choice but to acquire or be acquired.

**Burton** expanded its hardgoods offering and balanced its seasonality by acquiring **Channel Islands Surfboards**. Burton will also ship its first collection of action sports lifestyle apparel this year to be able to speak to its youth market year-round.

In the paddlesports market, a few more deals went down, but none were of the significance of the Watermark – Confluence deal last year. Confluence is still working on integration and getting its manufacturing and warehousing systems up to speed, but should see some up-side this spring. One deal that many retailers are keeping a close eye on is **Johnson Outdoor's** acquisition of **Lendal** paddles.

Also, **Legacy Paddlesports** and **LiquidLogic** joined forces in a merger of equals. While the two brands are relatively small, and Legacy is still technically a start-up, the merger should be beneficial for both.

**Thule** was clearly the most active consolidator on the hardgoods side this year, with acquisition agreements with anhaenger-center.com, a German trailer rental company; Pewag Schneeketten Group, an Austrian Snow Chain company; Star Industrier, a Swedish trailer manufacturer; Brink International BV; Valley Industries; and Sport-Rack Accessories. However, the company ran into some road blocks at the end of the year as the talks with the European commission caused Thule to withdraw its agreement with the Pewag Schneeketten Group, due to anti-trust concerns.

Other deals in the hardgoods sector included **Tecnica** acquiring **Blizzard** and moving the brand under the **Nordica** business; **Dalbello** and **Elan** forming a joint venture in the U.S. market; **Chisco** and **Chums** merging into a single company; **Deuter** being sold to Schwanhäußer, a German pen and cosmetics manufacturer for somewhere in the neighborhood of \$35 million; **Cascade Designs** selling its **SealLine SmartTrack** rudder system to **Smart Track LLC**; **Fiskars**, the parent company of **Gerber Legendary Blades**, acquiring the **Silva** Group and its U.S. subsidiary, **The Brunton Company**; **Mammut** acquiring **Lucido**; and **Implus** acquiring **Yak-Trax**.

The hardgoods sector saw a new player enter the game this year with **ORC Industries** acquiring **Redfeather Snowshoes** and **Bell Canoe Works**. Company CEO Todd Bahhub is working towards building a stable of brands that compliment the company's existing U.S.-based manufacturing facilities that employ disabled workers.

Finally, to finish out the year, **VF Corporation** acquired **Eagle Creek** in a deal valued at roughly \$32-\$36 million. The synergies are apparent with bag and luggage sourcing already in-place at VF through their JanSport and Eastpak brands. In addition, VF seems to have brands that do business in categories all around Eagle Creek, but none that are in direct competition.

Continued >>>



Not able to track your retail sales results on a weekly basis? You need SportScan/Info, The Standard in Sports Retail Sales Information.

*The B.O.S.S. Report* is published 52 weeks per year and delivered via e-mail the first business day each week.

Articles and subscription info can also be accessed daily at :

[www.TheBossReport.com](http://www.TheBossReport.com)

\* \* \* \* \*

**SportsOneSource, LLC**  
**The SportsOneSource Group**

PO Box 480156

Charlotte ▪ NC ▪ 28269

[boss@SportsOneSource.com](mailto:boss@SportsOneSource.com)

704.987.3450

704.987.3455 fax

[www.SportsOneSource.com](http://www.SportsOneSource.com)

\* \* \* \* \*

James Hartford, Group Publisher

[james@SportsOneSource.com](mailto:james@SportsOneSource.com)

Judy Leand, Editor-in-Chief

[jleand@SportsOneSource.com](mailto:jleand@SportsOneSource.com)

Casie Lester, Circulation

[casie@SportsOneSource.com](mailto:casie@SportsOneSource.com)

\* \* \* \* \*

Kris Versteegen, Managing Editor

[kris@SportsOneSource.com](mailto:kris@SportsOneSource.com)

Andy Kerrigan, Associate Editor

[andy@SportsOneSource.com](mailto:andy@SportsOneSource.com)

*The B.O.S.S. Report* newsletter is protected under all applicable copyright laws and is intended for the sole use and benefit of the subscriber.

Any attempt to copy, alter, distribute or otherwise transfer content of this copyrighted material is strictly forbidden.

In other words, you can pass it around once you print it, but you may not forward it via e-mail, print multiple copies or make copies of any kind for the purpose of distributing its contents beyond the addressed subscriber.

## Vendors Look to Owned Retail for Profits...

On the softgoods side, perhaps the most significant consolidation of the year was **Columbia**, acquiring their long-time competitor, **Pacific Trail** in a bankruptcy auction. The deal opened up the mass market for Columbia, but it also caused **Moonstone** to fade out of existence. The deal has yet to bear any real fruit for COLM, but should start to in 2007. Columbia also expanded its footwear portfolio with the acquisition of **Montrail**.

The largest deal of the year in the outdoor softgoods sector was put together by **Silversteep Partners**, an outdoor and active lifestyle-specific investment advisory firm. The company pulled **Helly Hansen** and **Altor**, a Norwegian private equity firm, together in a deal valued at an estimated \$185 million to \$200 million.

**Timberland** became a more active player in the acquisition game, while its core urban yellow boot business continues to struggle. The company is still doing an excellent job of transforming itself into an eco-conscious holding company. Deals for Timberland this year included acquiring the **GoLite** trademarks as well as **Howies**, a Welsh outdoor/action sports lifestyle brand that was built on environmentally friendly practices. There were reportedly several other investors looking at acquiring Howies and bringing the brand to the U.S.

**La Sportiva** N.A. saw a bit of action at the beginning of the year, when it merged with LaSportiva SPA, which is now its Italian parent.

Another deal that was significant for the market was **prAna** being acquired by Liz Claiborne. While this deal had no significant consequences for prAna's business - in fact there are more up-sides than not - it did show that major non-outdoor apparel corporations, other than VF, can pull off an acquisition in the outdoor industry without losing the core audience.

Other softgoods deals included **Vaude** acquiring **Edelrid**; **CamelBak Products** acquiring **Southwest Motorsports Enterprises**; **Crocs** entering into agreements to acquire **Jibbitz**, LLC for \$10 million in cash and **Exo Italia**; and **Oakley** inking a deal to acquire **Eye Safety Systems**.

Aside from the deal flow environment for the year, the biggest trend in the softgoods sector has been towards owned-retail. With The North Face, Columbia, Quiksilver, Cloudveil, ArcTeryx, and several other major brands establishing a presence or considering a presence in owned-retail, it is becoming a widespread trend in the industry. These vendors insist that their retail stores are designed to boost their dealers' sales and not to cannibalize their business.

At the same time, the outdoor industry is about to see its first completely vertically integrated company, taking products from design, to manufacturing, to retail in one business plan. **NAU**, which was originally formed as "under the wire" by several Nike and Patagonia vets last year, should be launching its first store sometime in 2007.

Finally, **The SportsOneSource Group**, which publishes *The B.O.S.S. Report*, made some news of its own this year with the acquisition of SportScan/INFO at the beginning of the year and the acquisition of the VNU Sports Business Media family of magazines and events, including **Sporting Goods Business**, **Outdoor Business**, **Hunting Business**, **Sporting Goods Dealer**, and several other events such as **THE ELITE Running Specialty Conference**, **OB Outlook**, and the **SGB Forum**. The deal accelerated SportsOneSource's entry into the world of print publishing and created several synergies between research, online newsletters, and traditional print media.

## 2006: The Top Stories that Never Happened...

**Woolrich** wasn't seeking suitors...

No one stopped buying **Crocs**, or **CROX**...

**Timberland** wasn't bought by Nike...

**K2 Inc.** didn't start selling off its brands...

**Timberland** wasn't bought by VF Corp...

**Cloudveil** was never sold by SBI ...

**VF Corp.** never acquired 350 **Eddie Bauer** stores to accelerate TNF's retail expansion plans...

**Woolrich** was never bought or sold...

Beaver Theodosakis didn't start wearing a suit after **prAna** was acquired...

**Berghaus** never started a North American subsidiary...

**Vaude** didn't pull-out of the U.S. market...

**Bode** didn't win gold...

**ANWR** is still protected, in spite of multiple efforts to the contrary...

**The Roadless Rule** is still in effect...

**Nordic Walking**...

**Orvis** was not acquired by anyone...

**China** never allowed their currency to trade on the open market...

**UGGs** never went out of style...

**Jack Wolfskin** never returned to the U.S. after it was acquired by Bain...

**Interbike** never died, in spite of some major brands pulling out...

**Armor Holdings** didn't form an outdoor group, except for Gregory...

**Gander Mountain** never stopped opening new stores...

**Action Sports** is still going strong at retail...

**Paintball** never bottomed out...

The expansion of the Salt Palace didn't dilute the **Outdoor Retailer Summer Market**. Quite the contrary, the show had more energy than ever...

**Eurobike International** did not launch a new show in Portland to compete with Interbike... Yet...

## Trade Industry Organizations Had a Busy 2006...

This year outdoor industry organizations were busy with their own consolidation efforts, some of which were successful, and others which are still shaking out.

In January, OIA acquired Outdoor University and began a transformation process for the program that matured in December. Previously, the program was designed exclusively to help retail floor staff learn about gear and retail floor sales strategies. Now, the program will be re-focused to fill a vital gap in the talent pipeline between floor staff and management. The 2007 Outdoor University programming will focus on management and higher level specialty retail staff, where training resources will improve business infrastructure.

TAPS and PPA were also deeply involved in discussions for the better part of the year concerning a potential merger between the two organizations. Both organizations kept things relatively quiet throughout the year, although there was certainly a buzz floating through the rumor mill concerning the merger.

In December, with Michael Parly taking over as executive director of TAPS, the organization stated that the merger will not happen, but TAPS and the PPA will continue to work together to ensure the health of the paddlesports industry

Finally, Retailers of the Outdoor Industry, a group that was previously a buying group for retailers, changed its name. Now known as The Grassroots Outdoor Alliance the group also changed its mission statement to be more inclusive and allow retailers to join the organization even if they do not meet the criteria to join the buying group.

The real vision for Grassroots is to help independent outdoor retailers engage their local communities in issues that are important to the health of the outdoor industry.

The changes in structure, merger talks, and acquisitions among the trade organizations did not slow down their efforts to be proactive for the industry, but now with these changes behind them, 2007 should allow more focus on operations and making even more of a difference for their members.

## And the Industry Gains Ground on Capitol Hill...

2006 can also be looked at as a turning point for government relations at OIA and SIA. All three were able to effectively lobby and push bills through the House and Senate that will have a tangible impact in years to come. Much of the progress was made during the final days of the 109th Congress. While many political analysts are comparing the 109th congress to the infamous "Do Nothing" congress during Truman's Presidency, both OIA and SIA were able to push several important bills through at the last minute.

OIA had been fighting to maintain funding for the Land and Water Conservation Fund, which had tentatively been zeroed out by the current administration. However, as one of its final acts, this Congress approved legislation that for the first-time provides a permanent source of funding for local parks and trails. The legislation establishes a direct source of funding for the Stateside LWCF that would not be subject to the appropriations process. The House and Senate also passed trade legislation containing several OIA-crafted provisions that would eliminate import tariffs on waterproof-breathable footwear.

SIA was able to reduce tariffs and duties on imported ski and snowboard footwear. SIA worked with members of Congress to extend duty breaks for SnowSports boots, which were set to expire this year, until the end of 2009. Additionally, the duty was further reduced from 4% to 0%. Products included in this duty reduction are snowboard boots, ski boots, and cross country ski footwear.

A major victory for the outdoor industry this year included a decision by U.S. District Judge Elizabeth Laporte, who over-ruled the Bush administration's decision to repeal the roadless rule. The decision ruled that the Bush Administration did not conduct a satisfactory environmental analysis before making changes that allowed states to decide how to manage individual national forests. The Roadless Rule originally protected 58 million acres of roadless forests in 39 states.

According to the Court, the administration is enjoined from taking any further action contrary to the Roadless Rule without undertaking environmental analysis consistent with Judge Laporte's judicial opinion. In addition, the court found that the Bush Administration failed to comply with the requirements of the National Environmental Policy Act and Endangered Species Act.

Not all of the battles on Capitol hill were won this year. The Small Business Health Care Plan, one of the top priorities during OIA's recent Capitol Summit and a key issue for the retailers in the industry, was defeated in Congress this year. The Bill was proposed by Senator Enzi this year and would have allowed industry associations to pool their members together to reduce health insurance administrative expenses and increase bargaining power. The bill, S.1955 received 55 favorable votes, but needed 60 votes to ensure passage.

Internationally this year, the European Union passed what was called a "compromise" footwear anti-dumping tariff, which will levy a 16.5% charge on footwear manufactured in China and a 10% charge on Vietnamese footwear. While these duties are lower than the previous temporary duties, 19.4% on leather shoes from China and 16.8% on those from Vietnam, most importers and retailers are opposed to the new tariff. This import duty will impact several U.S. outdoor brands, including Merrell, Columbia, and Timberland.

**>>> While not all news was positive, the Politicians in D.C. are taking the industry seriously for the first time, thanks to the efforts by our industry organizations...**

## VF Outdoor Coalition to Acquire Eagle Creek...

VF Outdoor, Inc. is in negotiation to acquire Eagle Creek, Inc. Eagle Creek currently has annual sales of approximately \$30 million. Terms were not disclosed, but *SEW* suspects that Eagle Creek sold for a premium, given the brand equity company founder Steve Barker and his team has built over the last 20 years. Industry watchers expect the deal closed for \$32 million to \$35 million, or close to 1.2X sales.

The synergies are apparent with bag and luggage sourcing already in place at VF through their JanSport and Eastpak brands. In addition, VF seems to have brands that do business in categories all around Eagle Creek, but none that are in direct competition for the adventure travel market. In particular, Eagle Creek's travel accessory business will be a nice addition for the VF Outdoor Coalition.

"We're excited at the prospect of adding the industry's authentic outdoor travel brand to our existing portfolio of outstanding brands," Dave Gatto, president of VF Outdoor, Inc. said in a press release. "Growth in the travel category is outpacing growth of the total outdoor business, and we expect this to continue given the desirability of travel among both baby boomers and Gen Y consumers... Eagle Creek's strong product pipeline, combined with VF Outdoor's proven ability to execute international brand growth strategies, should enable the Eagle Creek brand to sustain high-single digit sales growth over the next several years."

Eagle Creek brand products are currently sold through 700 outdoor specialty and 300 luggage specialty accounts. The brand is also sold in other international markets through distributors and licensees.

VF said in their official announcement that they are only "in negotiations" with Eagle Creek, but sources close to the deal claim that the transaction is simply waiting on various governmental approvals before the paperwork is signed. Closing of the transaction is expected to occur within 30 days.

Eagle Creek will remain based in Vista, California. Founder and President Steve Barker will continue to manage the brand, reporting to Gatto. Eagle Creek's EVP, Ricky Schlesinger will also continue in his current role. Eagle Creek was advised by Silver Steep Partners while VF had no advisors for this deal.

---

## Execute Sports to Sell Academy Brand and Pursue Strategic Options...

Execute Sports, Inc. plans to reorganize its business and to divest portions of its Snow Sports operations including the Academy brand. The goal is to reduce the company's operational cash flow requirements and create a "more efficient path to profitability." As part of the reorganization, the company's board of directors has appointed Celeste Berouty as president and as a member of the board of directors, while Todd Hahn has resigned from the CEO role and Todd Pitcher has resigned from the president and secretary positions as well as from the board of directors. Geno Apicella, Execute's founder was appointed the new CEO.

Management feels that it makes more sense to focus on its watersports brands and move away from the Snow Sports side of the business. The sale of the snowboard business should "significantly reduce" operating expenses. Apicella said that in addition to the sale of Academy, the company is "currently exploring further strategic options," to boost revenue and reduce expenses.

## Innovative Invests in VO Gloves...

VO Gloves, makers of CZiP gloves, has received \$2.5 million in new funding from Innovative Distribution. The funding will support VO's new product line and increase the company's manufacturing and design capabilities. VO Gloves has plans to develop product to address other outdoor consumers in addition to snowboarders and skiers, including field and stream and military. The company is also exploring licensing opportunities with other apparel and clothing accessory companies. "We invested in VO Gloves because of the company's innovation to the glove design," Jon Roddy, chief sales officer, Innovative Distribution said in a prepared statement.

## Nautilus Shuffles Product Development Teams...

Nautilus plans to relocate its Louisville, Colo.-based fitness product development facility to the company's headquarters in Vancouver, Wa. and then move its Apparel Division, including Pearl iZUMi from leased facilities in Broomfield, Colo., into the now vacated Louisville building, which the company owns.

Nautilus has had a presence in Colorado since it acquired the indoor exercise assets of Schwinn Fitness in 2001. The move will add 40-50 positions at the Vancouver headquarters, where the company currently employs 550.

According to the company, virtually all Louisville employees will be extended relocation offers, with the transition expected to be complete by March 2007.

## American Skiing Company to Sell Steamboat to Intrawest...

American Skiing Company has entered into a definitive agreement to sell Steamboat Ski & Resort Corporation to an affiliate of Intrawest for \$265 million. American Skiing Company initiated a review of strategic options for the resort in July.

Included in the sale are the resort and all resort-owned operations, all of Steamboat's resort-owned real estate assets, the commercial core of the Steamboat Grand Hotel & Condominiums and the company's interest in the Walton Pond Apartments complex.

The transaction is subject to customary closing conditions, including Hart-Scott-Rodino anti-trust approval and consent of the United States Forest Service, and is expected to close on or before March 31, 2007.

Bear Stearns and Main Street Advisors acted as financial advisors to American Skiing Company in connection with the transaction.

**Top Moves of 2006**

Former Patagonia employee **Jill Zilligen**; former Nike and Patagonia executive, **Chris Van Dyke**; **Ian Yolles**, former Nike on-line marketing Guru; and **Eric Brody**, also a former Nike executive, teamed up to form **NAU**, a vertically integrated outdoor retailer and manufacturer.

**Scarpa** Italy hired **Chris Clark** to head sales and marketing; appointed **Andrea Parisotto** as the new North American president; and hired **Kim Miller** as CEO of Scarpa N.A.

**Hi-Tec Sports** formed separate global divisions for Hi-Tec and Magnum, which was formerly considered a division of Hi-Tec. The Hi-Tec is now run by **Tony Linford**. The Magnum division will be headed up by **Paul Brooks**. **Bill Berta** and **Bob Kaiser** were appointed to replace Mr. Brooks in North America.

**Sally McCoy**, co-founder of Silver Steep Partners, took over as president and CEO of **Camelbak**, replacing J. Marty O'Donohue who was appointed to the role in January of 2006.

**Timberland** hired **Bill Dodge**, former national sales manager for Dunham, to lead the **GoLite** footwear division.

**Casey Sheahan** was appointed CEO and president of The Lost Arrow Corporation, parent of outdoor apparel company **Patagonia, Inc.**

**Obermeyer** president **Bill Post** resigned his position and moved to **The Tecnica Group** as President and CEO of Nordica Apparel. Obermeyer has not chosen a replacement, but **Klaus Obermeyer** will continue as CEO and the company hired **Alan Stewart** as its new Director of Production.

Former Cascade Designs president and CEO, **Lee Fromson**, joined **REI** to head up their private label program as VP of Gear and Apparel.

**Rich Hill**, former VP of sales for Patagonia has taken on the role of president of **Ibex Outdoor Clothing**.

**Yakima** named **Gerald T. Heinlen** to the position of chief executive officer, replacing Jim Clark, who resigned his position.

**Jim Van Dine**, **Jacqueline Lenox**, **Scott McGuire**, **Jenny Fredericks**, **Ed Shollenberger**, and **Jake Brandman**, formed **Ahnu** a new footwear brand. The team was formerly Van Dine & Partners, a footwear consulting firm, and before that was the majority of the Sr. management team for Keen Footwear.

**Keen** hired **Kirk Richardson**, former GM of Nike Outdoor business group, as president. In addition, the company appointed **Kris Hamper** as CFO, **Bobbie Parisi**, VP of Marketing and **Kelly Wallrich** as Director of Design and Development.

**Peter Worley** was hired to be **Teva** brand president.

**SmartWool** has hired **Anne Wiper** as their new VP and General Merchandising Manager. Ms. Wiper was formerly the Footwear Merchandise Director for Pearl iZUMi, and a Vice President at Salomon where she managed the Salomon Design Center in Boulder, Colo.

**Mike Dowse**, a 16-year veteran of **Amer Sports**, was named as president and general manager of the newly formed winter sports division at Amer, which now includes Salomon and all of its sub-brands. **James Curleigh**, who had previously served as president of Salomon North America, will take on the role of president of strategic development for the Division of the Americas; **Tom Berry**, formerly VP Sales for Salomon NA, has been promoted to president of Salomon USA.

# SPORTS ONE SOURCE

The Sporting Goods Industry Information Source

## The SportsOneSource Group Family

### MARKET RESEARCH

*SportScanINFO*

*SGB Brand Study*

*SOS Annual Industry Report*

*SOS Annual Retail Landscape Report*

*The Team Sports Report*

*The Footwear Report*

*The Skate Report*

### EXECUTIVE WEEKLY NEWSLETTERS

*Sports Executive Weekly*

*The B.O.S.S. Report*

*The POS Report*

### E-MAIL UPDATE NEWSLETTERS

*SGB UPDATE*

*Job Market UPDATE*

*Outdoor Business UPDATE*

*Footwear Business UPDATE*

*Team Sports UPDATE (new)*

### PRINT PUBLICATIONS

*Sporting Goods Dealer*

*Sporting Goods Business*

*Performance Sports Retailer*

*Footwear Business*

*Outdoor Business*

*Hunting Business*

### CAREER SERVICES

[www.SportsJobSource.com](http://www.SportsJobSource.com)

SOS Rep Search Directory

### EVENTS

THE ELITE Running Specialty Conference

SOS Sports Investor Conference

Outdoor Outlook Conference

The CEO Forum

We now reach over 20,000 industry professionals each business day through the **SportsOneSource UPDATE** newsletters and over 2,500 high-level executives read our executive level newsletters each week.

For subscription, sponsorship, advertising, or job posting information, call **SportsOneSource** today at 704-987-3450 or join us at our industry portal at:

[www.SportsOneSource.com](http://www.SportsOneSource.com)