

Trail Running Shoes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Light, Rugged, Off Trail), By End-Use (Men Vs. Women), By Distribution Channel (Supermarket/Hypermarket, Multi-branded Stores, Exclusive Stores, Specialty Stores, Online, and Others (Direct Sales)), By Region & Competition, 2021-2031F

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Abstracts

The Global Trail Running Shoes Market is projected to rise from a valuation of USD 8.79 Billion in 2025 to USD 13.11 Billion by 2031, expanding at a CAGR of 6.89%. These shoes are specifically engineered for off-road environments, equipped with durable outsoles for grip, fortified uppers for protection, and supportive midsoles for stability. A primary factor driving this growth is the increasing global focus on health and wellness, alongside a structural shift toward outdoor recreational activities. This trend is corroborated by rising engagement figures; the Outdoor Industry Association reported that 181.1 million people in the United States participated in outdoor activities in 2024, highlighting strong consumer demand for equipment that supports accessible fitness routines.

However, a major obstacle to market expansion is the reduced frequency of activity among new entrants. Although the overall number of runners is growing, the average annual outings per participant have decreased, which may prolong the product replacement cycle and reduce total sales volume for performance gear. Additionally, seasonal constraints and the need for proximity to trails can limit the potential customer base in crowded urban areas, creating complexities for manufacturers attempting to implement growth strategies.

Market Driver

Technological progress in footwear materials and performance is fundamentally altering consumer preferences, as runners increasingly prioritize specialized gear that delivers enhanced protection and energy efficiency. Cutting-edge innovations like carbon-fiber plates, nitrogen-infused foams with high rebound, and superior traction compounds are moving beyond elite circles to drive mass-market adoption by improving safety and comfort on rough terrain. This appetite for technical advancement is reflected in the financial performance of leading companies focused on development; for example, Deckers Brands revealed in its May 2024 fiscal results that HOKA, famous for its maximalist cushioning, achieved a 27.9% increase in net sales to \$1.807 billion year-over-year, demonstrating a strong link between proprietary technology and growth in the performance footwear sector.

The rise of organized trail running competitions also acts as a vital driver for market volume, establishing a formal ecosystem that demands specific equipment. Major international race series are seeing record interest, prompting participants to purchase durable, regulation-compliant shoes, which can shorten the replacement cycle. The UTMB Group announced in January 2024 that pre-registrations for the HOKA UTMB Mont-Blanc 2024 flagship race jumped by 30% compared to the prior event. This enthusiasm mirrors a wider shift in runner behavior; Running USA's 2024 Global Runner Survey indicated that 17% of respondents now prefer trail events up from 14% the previous year suggesting that event formalization is a key factor in converting casual runners into dedicated trail enthusiasts.

Market Challenge

A primary hurdle facing the Global Trail Running Shoes Market is the declining frequency of activity among new entrants, a trend often termed the "casualization" of the sport. As the user base expands to encompass recreational participants rather than solely committed athletes, the intensity of usage per runner has decreased. This evolution significantly changes the consumption pattern for high-performance shoes; casual users rack up mileage much more slowly than core enthusiasts, resulting in less degradation of outsoles and cushioning. Consequently, the product replacement cycle is prolonged, leading to fewer purchases per customer within a specific period, which dampens total sales volume despite the growth in the number of participants.

This reduction in engagement intensity is supported by recent data showing a divergence between participation counts and actual activity frequency. The Outdoor

Industry Association reported that in 2024, the average participant undertook only 65.2 outings per year, a figure significantly below the historical standard of 87 outings recorded in 2012. This gap suggests that although the number of people classified as participants has risen, their intermittent involvement restricts the recurring demand needed for sustained market value expansion, thereby making revenue prediction more difficult for manufacturers.

Market Trends

Integrating sustainable and bio-based materials is fast becoming a core strategy for trail shoe manufacturers, spurred by stricter regulations and growing consumer preference for environmentally friendly goods. Companies are progressively substituting traditional fossil-fuel derivatives with recycled fibers and organic materials to lower their environmental impact while maintaining durability and protection. This movement toward circularity is demonstrated by leading brands ramping up their use of sustainable materials in performance lines; On Holding AG stated in its April 2025 '2024 Impact Progress Report' that it obtained 84% of its polyester from recycled or renewable sources, a notable rise from the prior year, signaling that sustainability is now as vital as technical performance in product creation.

Concurrently, the blending of technical trail equipment with Gorpcore fashion is widening the market's scope from serious athletes to urban lifestyle buyers. Rugged, utilitarian footwear is achieving widespread popularity for everyday use, encouraging brands to create hybrid styles that merge off-road capabilities with streetwear looks. This development has driven significant revenue gains for established outdoor companies that have effectively adapted their technical lines for the casual sector. Amer Sports reported in its August 2025 'Second Quarter 2025 Financial Results' that its Outdoor Performance division, spearheaded by Salomon, saw a 35% year-over-year revenue jump to \$414 million, highlighting how the crossover of specialized trail gear into lifestyle fashion is generating a profitable income source separate from standard participation metrics.

Key Market Players

VF Corporation

New Balance Athletics, Inc

Wolverine World Wide, Inc.

Brooks Sports, Inc

Adidas AG

Nike, Inc.

SKECHERS USA, Inc.

ASICS America Corporation

Deckers Brands

Amer Sports

Report Scope

In this report, the Global Trail Running Shoes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Trail Running Shoes Market, By Product Type

Light

Rugged

Off Trail

Trail Running Shoes Market, By End-Use

Men Vs. Women

Trail Running Shoes Market, By Distribution Channel

Supermarket/Hypermarket

Multi-branded Stores

Exclusive Stores

Specialty Stores

Online

Others (Direct Sales)

Trail Running Shoes Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Trail Running Shoes Market.

Available Customizations:

Global Trail Running Shoes Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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