

# **Rugby Apparel Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Upper Wear, Bottom Wear, Socks), By Sales Channel (Specialty Stores, Sports Goods Stores, Online, Others), By Region, By Competition, 2018-2028**

<https://marketpublishers.com/r/RC7B8641A580EN.html>

Date: October 2023

Pages: 178

Price: US\$ 4,900.00 (Single User License)

ID: RC7B8641A580EN

## **Abstracts**

Global Rugby Apparel Market was valued at USD 978.88 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 11.5% through 2028. The global rugby apparel market has been steadily expanding in recent years, reflecting the growing popularity of rugby as a sport and a broader trend of increased interest in athletic wear. Rugby, a physically demanding and highly competitive sport, has a dedicated following worldwide, and this has translated into a demand for specialized rugby clothing.

Key factors driving the growth of the global rugby apparel market include the rising participation in rugby at various levels, from amateur to professional, and the increasing visibility of the sport through international tournaments and leagues. As more individuals engage in rugby, the need for high-quality, comfortable, and durable rugby apparel has surged.

Major players in the industry are continuously innovating to meet these demands. They are focusing on designing rugby jerseys, shorts, boots, and protective gear that not only enhance performance but also incorporate style and fashion elements, appealing to a broader audience beyond athletes.

Geographically, regions with strong rugby traditions, such as New Zealand, Australia,

England, and South Africa, continue to be significant markets. However, the sport's global appeal is leading to growth in emerging markets as well.

In conclusion, the global rugby apparel market is on a growth trajectory due to the increasing popularity of rugby as a sport. As consumer preferences evolve and the sport continues to expand its reach, the market for rugby-specific clothing is expected to remain dynamic and competitive, offering opportunities for both established brands and new entrants.

## Key Market Drivers

### Rising Popularity of Rugby as a Sport

One of the primary drivers behind the growth of the rugby apparel market is the increasing popularity of rugby as a sport. Rugby is played and followed by millions of individuals around the world, from amateur players to professional athletes. Major rugby tournaments like the Rugby World Cup and regional leagues have gained widespread viewership, further fueling interest in the sport. As more people become involved in rugby, there is a growing demand for rugby-specific apparel, including jerseys, shorts, socks, and protective gear.

### Globalization of Rugby

Rugby, once primarily associated with countries like New Zealand, Australia, England, and South Africa, has undergone a significant globalization process. Emerging rugby markets in regions like Asia, the Americas, and parts of Europe have seen a surge in rugby participation and fan engagement. The inclusion of rugby sevens in the Olympics has also contributed to the sport's global expansion. As rugby gains a foothold in new markets, there is an increasing need for rugby apparel to cater to the diverse player and fan base, driving market growth.

### Innovation in Rugby Apparel Technology

The rugby apparel market has witnessed substantial innovation in recent years. Sportswear companies are investing in research and development to create high-performance rugby clothing that enhances player comfort, durability, and performance. Technological advancements have led to the development of moisture-wicking fabrics, lightweight padding, and ergonomic designs that cater to the specific needs of rugby players. These innovations not only provide a competitive edge on the field but also

resonate with consumers seeking top-quality sportswear.

### Athleisure and Lifestyle Trends

Beyond the rugby pitch, there has been a broader shift towards athleisure and sports-inspired fashion trends. Rugby jerseys, hoodies, and other rugby-themed apparel have become fashionable streetwear items. This trend has expanded the market beyond traditional rugby enthusiasts to a broader consumer base looking for stylish and comfortable sportswear. Brands have capitalized on this trend by designing rugby apparel that blends sports functionality with everyday fashion, further boosting market demand.

### Corporate Sponsorship and Marketing

Corporate sponsorships and marketing initiatives play a significant role in promoting rugby apparel. Major rugby tournaments and teams are often sponsored by leading sportswear brands, which helps raise awareness about rugby-specific clothing. These sponsorships also create opportunities for limited-edition jerseys and merchandise, attracting both rugby fans and collectors. Additionally, marketing campaigns featuring rugby stars and athletes influence consumer choices and drive sales.

### Key Market Challenges

#### Competition from Established Sportswear Brands

The rugby apparel market is fiercely competitive, with established sportswear giants such as Nike, Adidas, and Under Armour dominating the industry. These companies have extensive resources, strong brand recognition, and well-established distribution networks. Competing with these industry leaders can be daunting for smaller or emerging rugby-focused brands. The dominance of these giants often results in limited market share for smaller players, making it challenging to gain a foothold in the industry.

To address this challenge, smaller rugby apparel brands need to focus on niche markets or unique selling points. This might involve specializing in specific aspects of rugby apparel, such as protective gear or custom team jerseys. Building a strong brand identity and leveraging digital marketing and e-commerce channels can also help smaller brands reach a wider audience.

### Cyclical Nature of Rugby Events

The rugby apparel market is heavily influenced by the timing and frequency of major rugby events, such as the Rugby World Cup and regional tournaments. These events generate a significant spike in demand for rugby-related merchandise, including jerseys, hats, and accessories. However, the cyclical nature of these events can lead to irregular revenue patterns for rugby apparel manufacturers and retailers.

To mitigate this challenge, businesses in the rugby apparel market must diversify their product offerings. Instead of relying solely on event-driven merchandise, they can develop a broader range of rugby-themed products that appeal to fans year-round. This includes lifestyle apparel, casual wear, and accessories with rugby branding. By expanding their product lines, companies can maintain a more consistent revenue stream throughout the year.

### Supply Chain Disruptions and Sustainability Concerns

Like many industries, the global rugby apparel market has been impacted by supply chain disruptions, which have become particularly acute in recent years due to factors like the COVID-19 pandemic. These disruptions can lead to delays in production, shipping, and delivery, affecting the availability of rugby apparel products. Additionally, there is a growing focus on sustainability in the sportswear industry, including concerns about the environmental impact of apparel production and the disposal of worn-out rugby gear.

To address these challenges, companies in the rugby apparel market should prioritize supply chain resilience and sustainability. This may involve diversifying suppliers to reduce reliance on a single source, adopting digital supply chain management tools, and implementing sustainable practices such as using eco-friendly materials and reducing waste. Communicating these efforts to consumers can also enhance brand reputation and customer loyalty.

### Complexity of Sizing and Fit

Rugby apparel, like other sportswear, must accommodate a wide range of body types and sizes. Achieving the right fit is crucial for player comfort and performance. However, sizing standards can vary between brands, regions, and even product lines, leading to confusion for consumers. Additionally, rugby players often require specialized fit considerations for protective gear, such as shoulder pads and scrum caps.

To address sizing and fit challenges, rugby apparel brands should invest in comprehensive size guides and fit recommendations to assist customers in making informed purchasing decisions. Offering customizable options for team jerseys and protective gear can also help address unique sizing needs. Brands that prioritize inclusive sizing and fit options can attract a more diverse customer base and build customer loyalty.

## Key Market Trends

### Athleisure and Lifestyle Integration

The fusion of athletic wear with everyday fashion, often referred to as athleisure, continues to influence the rugby apparel market. Rugby-themed clothing, including jerseys, hoodies, and track pants, has transcended the field and become popular streetwear. Consumers are drawn to the comfort, durability, and sporty aesthetic of rugby-inspired apparel, making it a fashion statement beyond the pitch.

To capitalize on this trend, rugby apparel brands are expanding their product lines to include casual, lifestyle-oriented pieces. They are incorporating rugby branding and design elements into everyday clothing, catering to a broader demographic that values both style and functionality in their clothing choices.

### Sustainability and Eco-Friendly Materials

Sustainability has become a dominant trend in the sportswear industry, and rugby apparel is no exception. Consumers are increasingly conscious of the environmental impact of clothing production and are seeking eco-friendly alternatives. Rugby apparel brands are responding by adopting sustainable practices, such as using recycled materials, organic fabrics, and environmentally friendly manufacturing processes.

Companies that prioritize sustainability are not only appealing to environmentally conscious consumers but also demonstrating their commitment to responsible business practices. Sustainable rugby apparel aligns with the global push towards eco-friendliness, reducing the carbon footprint of the sportswear industry.

### Customization and Personalization

Personalization is a growing trend in the rugby apparel market. Players and fans alike seek the ability to customize their jerseys, team gear, and other apparel items with

names, numbers, and logos. Customization adds a sense of individuality and connection to one's team or favorite players.

To cater to this trend, rugby apparel brands are offering customizable options through online platforms and physical stores. Customers can choose from a variety of design elements, colors, and personalization features to create unique rugby apparel that suits their preferences. This trend enhances customer engagement and loyalty while providing a personalized experience.

### Digitalization and E-Commerce Growth

The growth of e-commerce and digital platforms is transforming the way rugby apparel is marketed and sold. Consumers increasingly turn to online channels to browse, purchase, and research rugby apparel. This shift has accelerated due to the COVID-19 pandemic, which limited in-person shopping opportunities.

To remain competitive, rugby apparel brands are investing in robust online presences, user-friendly e-commerce websites, and mobile apps. They are also leveraging social media and digital marketing to engage with consumers and promote their products. The ability to offer a seamless online shopping experience and reach a global customer base is critical in today's rugby apparel market.

### Inclusivity and Diverse Representation

The sports industry, including rugby, is becoming more inclusive and diverse in its representation of athletes and fans. Rugby apparel brands are reflecting this trend by featuring a wider range of models and athletes in their marketing campaigns and product offerings. Inclusivity extends to size diversity, gender inclusivity, and representation of different cultural backgrounds.

Brands that embrace inclusivity not only demonstrate a commitment to diversity but also expand their potential customer base. Consumers appreciate brands that celebrate individuality and make an effort to cater to a broad spectrum of tastes and identities.

### Technological Advancements in Performance Gear

Rugby players demand high-performance gear that enhances their comfort, protection, and agility on the field. Technological advancements in materials and design are influencing the development of rugby-specific apparel and equipment. This includes

moisture-wicking fabrics, advanced padding and protection systems, and ergonomic designs that improve mobility and durability.

To stay competitive, rugby apparel brands are investing in research and development to create cutting-edge products that meet the rigorous demands of the sport. These innovations not only benefit professional rugby players but also enhance the experience of amateur players and enthusiasts.

## Segmental Insights

### Product Type Insights

Bottom wear has emerged as a rapidly growing segment within the global fashion industry. Traditionally, the focus was primarily on tops, but the recent surge in demand for stylish and versatile bottoms has propelled this segment into the limelight. Several factors contribute to the growth of bottom wear as a prominent fashion category.

Firstly, the evolving work culture, especially with the rise of remote work and the gig economy, has shifted preferences towards comfortable yet trendy clothing. This has led to a surge in demand for casual and athleisure-inspired bottoms like joggers, leggings, and comfortable pants that can seamlessly transition from work to leisure.

Secondly, sustainability concerns have driven consumers to seek eco-friendly and durable options. Many brands are responding by introducing sustainable materials like organic cotton and recycled fabrics in their bottom wear collections, aligning with the growing eco-consciousness of shoppers.

Additionally, the influence of social media and fashion influencers has played a pivotal role in popularizing unique and trendy bottom wear styles. These platforms showcase a variety of fashionable bottom wear options, inspiring consumers to experiment with their looks and incorporate statement pieces into their wardrobes.

As a result, fashion retailers and brands are investing more in the design and marketing of bottom wear, offering a diverse range of styles, cuts, and materials to cater to the evolving tastes and preferences of consumers. The bottom wear segment is not only growing but also driving innovation and creativity in the fashion industry, making it a significant contributor to the overall market.

## Sales Channel Insights

The online retail sector has witnessed explosive growth over the past decade, becoming a dominant and continually expanding segment of the global commerce landscape. Several factors contribute to the remarkable ascent of online shopping as a growing segment:

First and foremost, the convenience factor has been a game-changer. Online shopping offers consumers the ability to browse and purchase products from the comfort of their homes, eliminating the need for physical store visits and long queues. This convenience is particularly appealing in an era marked by busy lifestyles and the desire for efficient, time-saving solutions.

The proliferation of smartphones and digital devices has significantly fueled online shopping. Mobile apps and user-friendly websites have made it easier for consumers to shop on the go, leading to a surge in mobile commerce. The ease of access to online stores and the ability to make purchases at any time contribute to the segment's rapid growth.

The COVID-19 pandemic further accelerated the shift towards online shopping. Lockdowns, social distancing measures, and health concerns prompted many consumers to shift their shopping habits to online platforms. Even as restrictions eased, many continued to embrace online shopping due to the perceived safety and convenience it offers.

Moreover, the variety and diversity of products available online have greatly expanded. E-commerce platforms offer an extensive range of products, from everyday essentials to niche, specialty items. This broad selection caters to a wide spectrum of consumer preferences, contributing to the segment's robust growth.

Additionally, the convenience of home delivery and flexible return policies has enhanced the online shopping experience, reducing some of the barriers that once existed in this space. Many online retailers offer fast and reliable shipping options, further enticing consumers to shop online.

Furthermore, the growing adoption of digital payment methods and enhanced cybersecurity measures have bolstered consumer confidence in online transactions. Secure and hassle-free payment options have played a pivotal role in driving online shopping's growth.



In response to this booming segment, businesses have shifted their strategies to prioritize online retail channels. Traditional brick-and-mortar retailers have established robust online presences, while digitally native brands have flourished in the online space. Marketing efforts, such as influencer collaborations and targeted digital advertising, are increasingly focused on online platforms.

In conclusion, the online retail segment has evolved into a powerhouse within the global commerce landscape. Driven by convenience, technology, a diverse product range, and changing consumer preferences, online shopping continues to experience significant growth. As e-commerce platforms continue to innovate and improve the online shopping experience, this segment is poised for sustained expansion in the years to come.

## Regional Insights

North America represents a dynamic and continually evolving segment across various industries, including technology, business, and commerce. Several factors contribute to the region's status as a growing segment:

Firstly, North America is home to some of the world's largest and most influential technology hubs, such as Silicon Valley in California and the burgeoning tech scenes in cities like Austin, Texas, and Toronto, Canada. These innovation centers foster the growth of startups, tech giants, and cutting-edge research, leading to advancements in sectors like artificial intelligence, biotechnology, and renewable energy.

Moreover, North America boasts a diverse and robust economy that supports various industries. The region's commitment to entrepreneurship and business-friendly policies has attracted investments and encouraged the growth of both established corporations and small businesses. This economic stability and resilience contribute to North America's prominence.

In addition, North America plays a vital role in global trade and commerce. The United States, Canada, and Mexico are all part of significant trade agreements like the United States-Mexico-Canada Agreement (USMCA) and have well-developed infrastructure and logistics networks that facilitate the movement of goods and services. This connectivity drives economic growth and strengthens the region's position as a global trading hub.

Furthermore, North America is experiencing shifts in consumer preferences, with a growing emphasis on sustainability, digitalization, and e-commerce. This has led to the

proliferation of environmentally conscious businesses, online retail platforms, and digital services that cater to changing consumer demands.

The region's cultural diversity and openness to immigration also contribute to its growth. North America attracts talent and entrepreneurs from around the world, fostering innovation and cultural exchange. This diversity is reflected in various sectors, including technology, entertainment, and culinary arts, adding richness and vibrancy to the region's offerings.

Additionally, North America's commitment to research and development, particularly in fields like healthcare and biotechnology, positions it as a leader in cutting-edge medical treatments, pharmaceuticals, and scientific advancements.

In conclusion, North America stands as a growing segment in the global landscape due to its innovation, diverse economy, international trade connections, evolving consumer preferences, cultural diversity, and commitment to research and development. As the region continues to adapt and innovate in response to changing global dynamics, it remains a pivotal player in shaping the future of numerous industries.

### Key Market Players

O'Neills Irish International Sports Co. Ltd.

Olympus Rugby

MACRON SPA

KOOGA

Gilburt Rugby

Decathlon SA

Canterbury

Nike Inc.

BADGER RUGBY LTD.

Adidas AG

Report Scope:

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

Rugby Apparel Market, By Product Type:

Upper Wear

Bottom Wear

Socks

Rugby Apparel Market, By Sales Channel:

Specialty Stores

Sports Goods Stores

Online

Others

Rugby Apparel 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

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Rugby Apparel Market.

## Available Customizations:

Global Rugby Apparel market report with the given market data, Tech Sci 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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  - 14.1.6.4. Key Market Focus & Geographical Presence
  - 14.1.6.5. Recent Developments
  - 14.1.6.6. Key Management Personnel
- 14.1.7. Canterbury
  - 14.1.7.1. Company Details
  - 14.1.7.2. Products & Services
  - 14.1.7.3. Financials (As Per Availability)
  - 14.1.7.4. Key Market Focus & Geographical Presence
  - 14.1.7.5. Recent Developments
  - 14.1.7.6. Key Management Personnel
- 14.1.8. Nike Inc.
  - 14.1.8.1. Company Details
  - 14.1.8.2. Products & Services
  - 14.1.8.3. Financials (As Per Availability)
  - 14.1.8.4. Key Market Focus & Geographical Presence
  - 14.1.8.5. Recent Developments
  - 14.1.8.6. Key Management Personnel
- 14.1.9. BADGER RUGBY LTD.
  - 14.1.9.1. Company Details
  - 14.1.9.2. Products & Services
  - 14.1.9.3. Financials (As Per Availability)
  - 14.1.9.4. Key Market Focus & Geographical Presence
  - 14.1.9.5. Recent Developments
  - 14.1.9.6. Key Management Personnel
- 14.1.10. Adidas AG
  - 14.1.10.1. Company Details
  - 14.1.10.2. Products & Services
  - 14.1.10.3. Financials (As Per Availability)
  - 14.1.10.4. Key Market Focus & Geographical Presence
  - 14.1.10.5. Recent Developments
  - 14.1.10.6. Key Management Personnel

## **15. STRATEGIC RECOMMENDATIONS**

15.1. Key Focus Areas

15.2. Target Product Type

15.3. Target Sales Channel

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