

BY MICHAEL HODGSON

WHAT IS A SOFT SHELL, REALLY? The answer depends on whom you talk to. Most folks generally agree that soft shell garments are stretchable, breathable, compressible, highly water-resistant, very comfortable and—without a doubt—made with fabrics (mostly abrasion-resistant) that are woven, knit or even non-woven. But here the agreement ends and the finger wagging begins.

How stretchable are soft shells? How breathable? Or should they be air permeable? How compressible? How water-resistant? Heck, we can't even agree on the format for the term. You'll see "soft-shell," "softshell," "SoftShell," and "soft shell." Some manufacturers assert soft-shell, softshell, soft shell (whatever) is an actual category, while others say it isn't. Some predict that these garments will account for major sales, while a few doubt their potential to make any real economic impact.

Some say we need to define soft shells to keep out the riffraff, and others, SNEWS/GearTrends included, think that it's ridiculous and dangerous to create a rigid definition.

To understand what brought us to this place, you must look back a few years to examine the origins of the category and the current name, soft shell.

A HISTORY LESSON...

1994-1995: Mammut introduces the Chamonix pant using Schoeller Dynamic fabric. Fabrics in this category are labeled "stretch woven" with no such phrase as "soft shell" in the vernacular.

1997: Cloudveil introduces the Serendipity jacket—inspired after using Chamonix

pants in tests—made with Schoeller Dry Skin. Still not even a whisper of the phrase "soft shell."

1998: A review of interview notes from my files following a pitch from Penn Newhard of Backbone Media reveals his description of the Serendipity jacket as "like a shell, only soft." While not a direct reference to the now popularized phrase, it's darn close.

1998-1999: Mike Blenkarn, design guru for Arc'Teryx, prods Malden to partner with Enterprise Coatings and Tweave to create Polartec Power Shield. Arc'Teryx creates the Gamma SV, which is generally acknowledged as the garment that launched the soft shell phenomenon. However, still no public mention of the phrase soft shell.

1999: After in-depth research of magazines, catalogs, workbooks and trade show newspapers, we can say with confidence that the first published words referring to soft shells were in, yes, SNEWS (GearTrends' sister publication for outdoor and fitness news).

In the February 1999 edition, SNEWS wrote: "Apart from all the new elegance, perhaps the most intriguing outerwear story of the Show was that of 'hard shell'

versus 'soft shell.'

These terms refer to the differences between waterproof/breathable garments (hard shells) and the new generation of technical pieces employing fabrics like Malden's PowerShield. Arc'Teryx Gamma pieces and their hybrid Alpha SV suit included three-layer ePTFE on top and PowerShield on the bottom.

Also new was Schoeller's Dryskin, used by Cloudveil and Marmot in its Crestone Stretch jacket. The new generation included Dynamic fabric and wool-based Ski Fans, which Ixex used for jackets and pants.

This new generation included Nextec's Epic fabric, which Patagonia includes in the new Velocity shell, as well as the Infurno, Fusion and Zephyr garments.

All of these are far more breathable than any hard shell system, but offer enough weather protection for all but the most inclement situations. On top of that, most of the soft shell garments function as mid-layer pieces in nasty conditions, and they perform as outerwear the rest of the time."

Who gets credit for tipping us off to the terms "soft shell"? Depends on whom you talk to, but we say that when Arc'Teryx and Patagonia both embraced the terminology it became a full-blown buzz word—thanks guys.

2002 (January): Nextec sponsors the first seminar on soft shells in Anaheim, Calif., during the Outdoor Retailer Winter Market trade show. The 7 a.m. program is titled "Demystifying the Rapidly Emerging Soft Shell Category." Suddenly, manufacturers who'd never called their products soft shells jump on the band-

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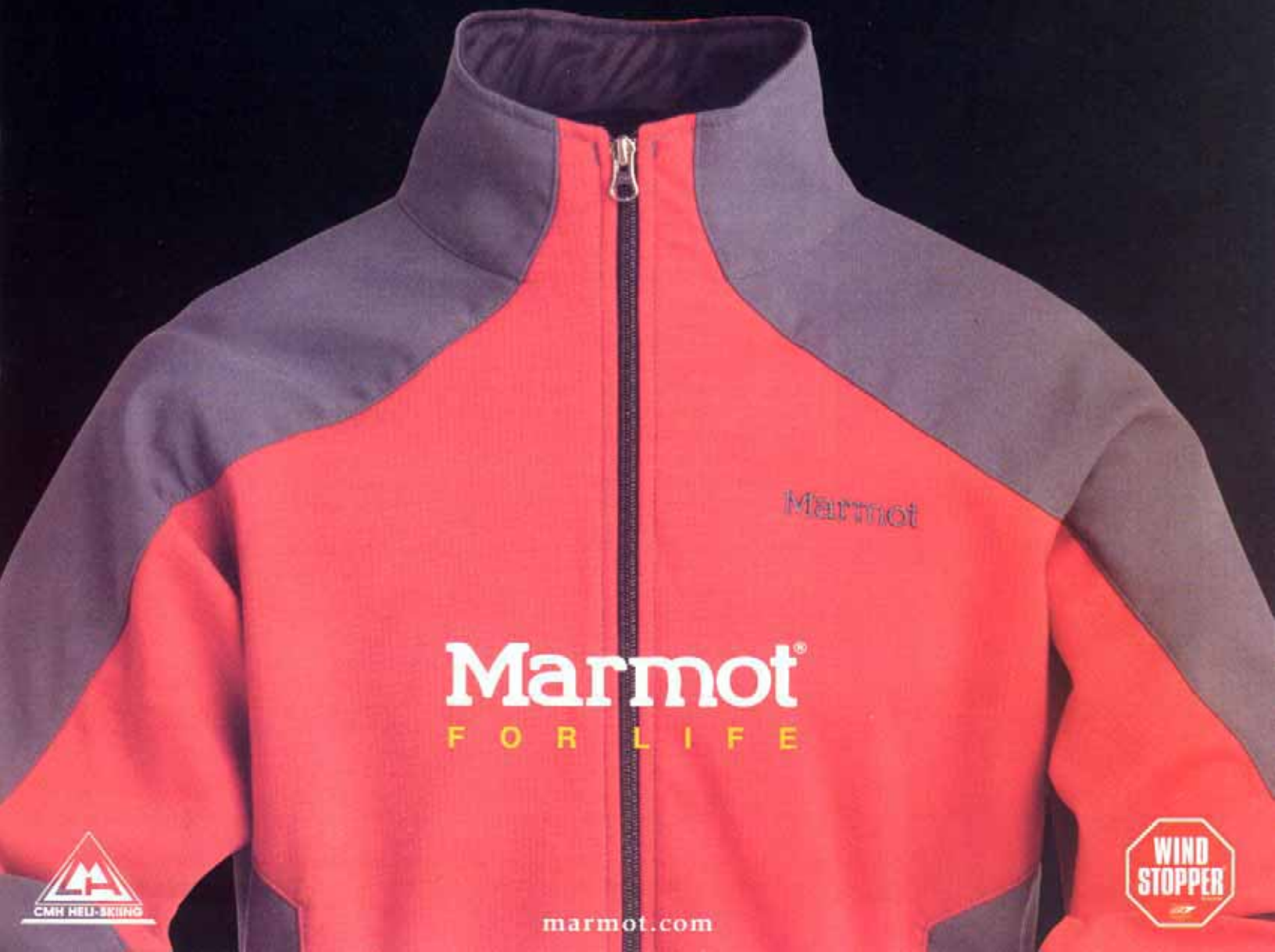
Diny Harrison lives for the mountains. As the first North American woman to become an internationally certified full mountain guide and member of the International Federation of Mountain Guides, she climbs and guides throughout the world. As a Canadian Mountain Holiday Heli-Ski Guide, she leads groups down remote, virgin snow covered peaks in the winter. And as a part-time artist, she silk screens mountain landscapes in her spare time. So it's only natural that when she dresses for work, she prefers clothes that are as at home in the mountains as she is herself. Namely, the Sharp

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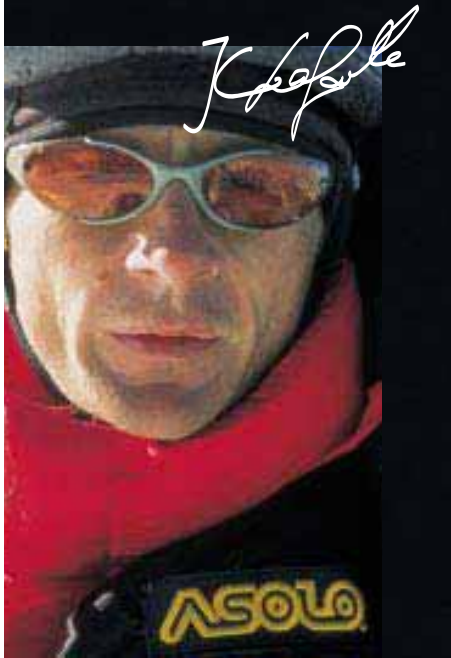
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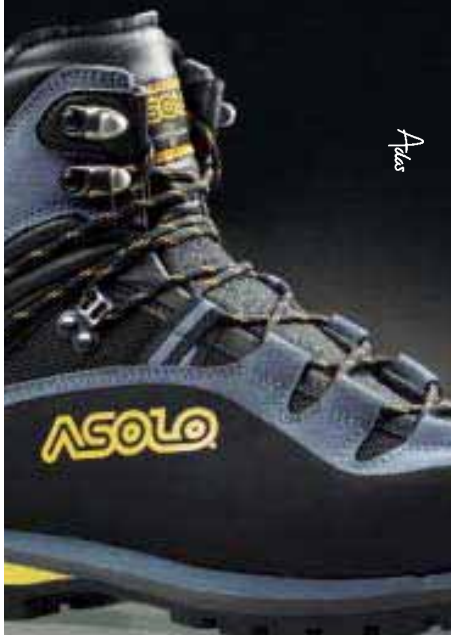


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wagon, and the race is on.

2002 (Summer): Not to be outdone by the United States, two more panel discussions are held in Germany, each drawing about 300 participants by rough estimates. Nextec sponsors a second seminar at Outdoor Retailer Summer Market. A call for standardization is made, and denounced. Schoeller Textil AG, the Swiss parent company of Schoeller Textil USA, files for trademark registration of "soft shell" in the major countries throughout the world, including the United States.

In a statement issued to SNEWS that August, Schoeller stated: "Schoeller was the original technology provider in this emerging market, and realized the need to curb the ever-expanding definition of soft shell to stabilize the legitimacy of this category. Schoeller did not attempt to trademark 'soft shell' in order to monopolize the category, or to withhold trademark from legitimate soft shell manufacturers and suppliers. It is not Schoeller's ambition to suppress further innovations or inhibit the future growth of this exciting category." The move receives instant criticism and opposition in the United States and other parts of the world.

2002 (October): W.L. Gore Europe officially enters the soft shell game with a workshop at Mont Ventoux, France, where it introduces to 80 retailers and media a Windstopper jacket with more stretch, dubbed appropriately, Windstopper Soft Shell.

AND THE PLAYERS ARE?

Now that you're up to date on history, what should you expect for the near future? Expect the current players to continue tweaking their products, while new players step up with their own soft shell fabrications and proprietary offerings. The most recognizable players include W.L. Gore, Schoeller, Nextec, Malden Mills (Polartec), Consoltext and Toray.

As for the companies making soft shell garments, those include, but are not limited to (we just love that legal terminology), Arc'Teryx, Cloudveil, Marmot, Salomon, The North Face, Mountain Hardwear, Sierra Designs, Patagonia, RLX Polo, Mammut, Ibex and Sugoi.

SO WHAT IS A "SOFT SHELL" REALLY?

It's really just a marketing term, nothing more, nothing less. Mammut, Cloudveil, Arc'Teryx, Ibex, Patagonia and many others were successfully selling garments in the soft shell category long before the buzzword. In fact, well before 2002 sev-

eral manufacturers told us they were selling garments that met the soft shell definition, but no one had been calling them that because, well, the phrase didn't have cache. Ahhh, blame it on the media for jumping on the bandwagon, even if we couldn't see where it was heading.

We also have to wonder what is with all this crowing about soft shell as a "new" thing. It isn't! Sure, within the category there are many new fabric technologies that raise the performance bar and broaden the applications. But the concept isn't new. Just for the record, SNEWS has long pointed out that even an oiled wool sweater, by the current still-malleable definition, is a soft shell. And let's not forget the Buffalo Jacket using Pertex and pile. As the Brits are so keen to remind us, that jacket has been around for 20 years.

The bottom line? Soft shell as a tag line is really nothing more than a calculated and very aggressive play by fabric companies to create the next "Gore-Tex" buzz. And that's fine, but please realize it for what it is and respond accordingly.

Frankly, soft shell is not a very good term, even though we (SNEWS) were the first to publish it—we apologize. Unlike a term such as waterproof/breathable, soft shell is far too simple a phrase for such a broad concept. Manufacturers continue to churn out a wide variety of products—all dubbed soft shells—that perform in a variety of ways for many applications. This has confused consumers and retailers, who are still not sure how to best use these garments.

Meanwhile, retailers and manufacturers have written to us declaring their preferred names for the technology. For example, REI has started using a positively brilliant and far more understandable tag, Single Layer Technology and, yes, the company had the foresight to trademark it before using it. The industry has stumbled too far along the soft shell path to turn back now, and perhaps that is OK. Most, though not all of the hundreds of folks we've interviewed over the last year, agree that the current products in consumer catalogs, in the workbooks, and on the drawing boards could provide this industry a shot in the arm.

Even if "soft shells" are not named very well, they are certainly excellent clothes. The GearTrends team has concluded that clothes in the soft shell category (or an 80 percent garment, as Schoeller calls soft shell) offer consumers a more versatile and comfortable alternative to the classic mid-layer/outer-layer systems the industry has promoted

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WHAT'S SO "HARD" ABOUT A SHELL?

Unfortunately, the term "soft shell" implies that other, alternative protective garments are just the opposite—"hard shells." We admit guilt in helping to propagate the term "hard shell," and please accept our apology once more. However, there is nothing hard about a shell designed for more extreme weather protection. Hard implies uncomfortable and an almost armor-like exterior, which to the best of my knowledge, is not embodied by any fabric melded with a

Depending on this information, retailers might need to offer customers any one of a dozen soft shell choices, because even in soft shells there are many performance variables—yet another reason why a single definition is impossible.

Though Marmot is not perfect—and we don't recommend that everyone adopt its system—we do commend the company for its solid attempt to help retailers match garments to customers. If customers want a garment that is primarily water resistant, but also wind resistant and insulative, then they are pointed to one product grouping designed for use in cooler, wetter climates during low to intermittent aerobic activity. If customers need something where wind resistance is most important, breathabili-

▶ RETAILERS DON'T CARE ABOUT HYPE, THEY

waterproof/breathable laminate or coating currently on the market. Portraying clothing as hard is not a preferable way of representing such technology to consumers unless losing sales is a goal.

While I agree that we need to have an additional defining point to clarify the differences between the characteristics of a soft shell and a shell for more severe weather, embracing "hard" as the word choice ain't gonna get it done. How about we opt to call them "storm shells"?

CLOSING THE SALE

Soft shell? Hard shell? Storm shell? Performance shell? Whatever! It has become very clear that marketing hype and a search for an impossible definition and an even more ridiculous set of standards aren't very important to retailers. Being told and shown through POP displays and training how to best sell each and every garment remains the paramount issue.

Manufacturers and suppliers must work together to help teach retailers and consumers that the soft shell category represents a group of products that have a wide variety of performance characteristics, offering consumers tremendous benefits and options if—and this is a HUGE "if"—the retailer knows how to sell them.

Mark Galbraith of Patagonia has correctly pointed out on more than one occasion that retailers can outfit customers with the correct storm shell and soft shell layers only if they determine the intended activity, the duration of the activity, and the anticipated weather conditions during the activity.

ty second, and water resistance third, another grouping houses clothes for moderate to cold conditions in drier climates when aerobic output is moderate. There's more to the chart but we won't bore you here—contact Marmot.

And, we're not talking about selling only soft shells here, gang. Soft shell technology leaders such as Cloudveil, Patagonia, Arc'Teryx and Marmot are quick to remind retailers they'll often sell storm shells and soft shells together. Customers often need to pack both during an extended outing. As a result, manufacturers are creating pieces that are compact and as light as possible. As prices for soft shells come down to the \$200 range, it is very possible to outfit a customer in a versatile system that includes a storm shell of Precip, PacLite or another proprietary coating or laminate, as well as a soft shell, all for \$360. That will make far more sense to consumers than spending \$400 on a single, two- or three-layer waterproof/breathable piece they'll only use a few times each year.

Keep in mind, before retailers can understand how to sell a manufacturer's soft shell offerings they must wear the stuff outdoors. Retailers tell us that once staff members understand the wide performance capabilities of the products, the term "soft shell" will essentially become irrelevant to a selling conversation. Instead, it will be more about meeting a consumer's needs based upon a series of activity-related questions. The retailer will then direct the customer to the best garment or set of garments that will function

best and satisfy the customer's tastes.

THE FUTURE: OUR VIEWS & MUSINGS

Forget standardization. It's a silly idea supported by those who would stymie innovation to cling to a limited concept of an idea. Ditto the idea of trademarking the name. Would you find logic in defining the phrase "sleeping bag" or even trademarking it? We all know what a sleeping bag is, and yet there are literally hundreds of ways to make a sleeping bag by combining shapes, fabrics, fills and more to arrive at a bag that meets a customer's needs and desires.

Remember the attempt to standardize temperature ratings a few years ago? Right. Let's not do that again, please? Soft shell embraces a broad concept that

CARE ABOUT SALES.

is best left to the minds of the designers to create, and then the retailers to learn how to best mix and match the offerings to their customers. We need to grow our industry, not stymie it.

Prices will come down with proprietary offerings. Price has, for now, been a barrier of sorts to broader consumer acceptance of the soft shell category. Beginning with 2003, we will see more companies turning to proprietary fabrications and blends of fabrications. That should increase the number of products in the \$150 to \$200 range, and that, in turn, will make the product category more attractive to a broader audience.

Mosaic approach to designs will increase. More soft shell designers are using multiple fabric technologies in various parts of garments, depending on need and aesthetics, and we expect to see this even more. In 2003 look for garments with as many as six or seven fabric combinations to provide both performance enhancement, such as increased stretch and mobility in flex areas, abrasion-resistance in impact and rub areas, and wind and moisture-resistance in areas likely to leak or dampen.

Aesthetic enhancements will improve the fit and look of clothes while they're on the rack or on the customer. Natural fibers such as wool are finding their way into soft shells, and that will continue too, both for aesthetics and performance—we've seen a number of wool applications in soft shells this year and they look downright classy!



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