

# STATE of the INDUSTRY

2023

Summary of Consumer Behavior  
in Fly Fishing Specialty Retailers

Sponsored by



insights by

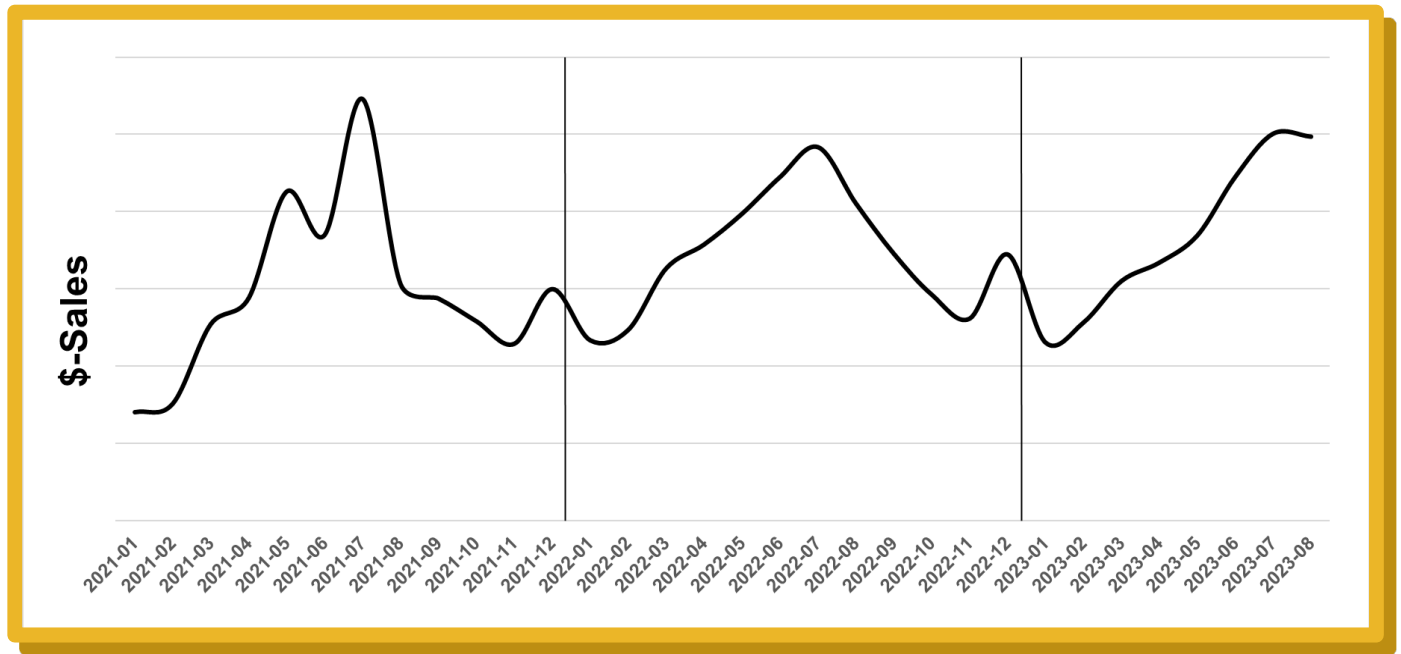


The fly fishing specialty channel has seen some notable changes over the last few years with product sales increasing year over year slightly higher relative to other outdoor activities.

In this report, we will be discussing key data discoveries from the insights provided by TrackFly and how retailers and brands can prepare for the future.

# Product Sales Seasonality

(Fly Fishing Specialty Channel)



The economic events that occurred between 2020 and 2022 created a surge of interest in outdoor activities, resulting in consumer demand never before seen by many retailers in the fly fishing specialty channel. TrackFly's data insights reveal that in 2021 there was a particular time that left many retailers and brands unprepared for the sudden product demand they would experience.

As seen on the graph, May 2021 experienced a strong start to the season, but instead of having a steady growth in product sales as would be predicted, there was a sudden drop followed by an even bigger surge in sales during the month of July. This anomaly can be attributed to the supply chain constraints that many brands and retailers experienced that year while trying to keep up with an unexpected increase in product demand. What TrackFly's insights also reveal is that despite the 2021 anomaly the fly fishing specialty channel, in particular, has experienced a steady year-over-year growth relative to other outdoor channels.

# YOY, Category Growth (for Year Ending in August)

According to TrackFly's insights, there has been a 5% increase in top-line product sales for the last 12 months ending in August 2023, but not all product categories have shared in that growth. As expected the top revenue-driving categories of rods, reels, soft goods, and waders all contribute to the steady growth of product sales.

What TrackFly's data reveals is that rod sales have remained flat, with reels up only 6%. The data also reveals that wading products including waders and wading boots are up 15% while soft goods are up 36%.

## TRACKFLY DATA REVEALS YEAR OVER YEAR CHANGES

**5%**

increase in top-line  
product sales

**15%**

increase in wading  
products sales

**-1%**

flat rod sales

**6%**

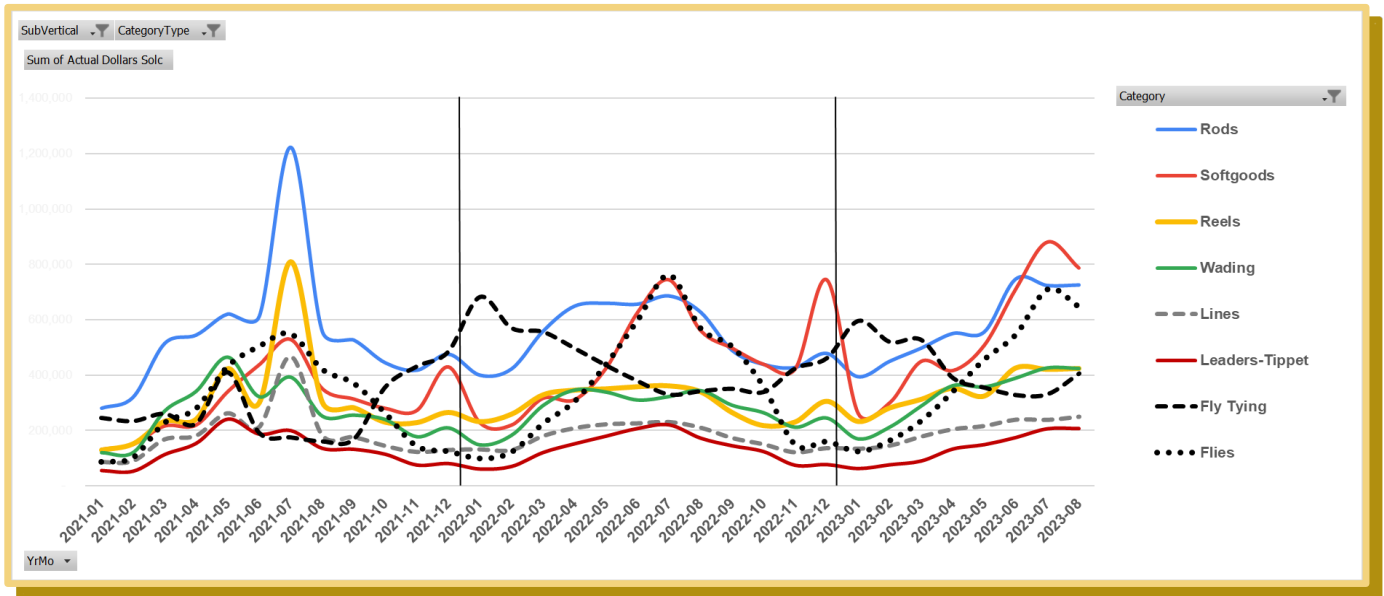
increase in reels sales

**36%**

increase in  
soft goods sales

PRODUCT CATEGORY	YEAR OVER YEAR Δ
Rods	-1%
Softgoods	36%
Fly Tying	-4%
Flies	9%
Reels	6%
Wading	15%
Lines	4%
Leaders-Tippet	-4%
Fishing Accessories	-12%
Lifestyle Accessories- Gifts	10%
Watercraft	-17%
Packs-Vests	7%
Rod & Reel Combos	-9%
Eyewear	-5%
Tools	-20%
Luggage-Case	35%
<b>Total Product Sales</b>	<b>+5%</b>

# Sales by Category, Seasonal Trend (Fly Fishing Specialty Channel)



The following charts are summaries of the fly fishing specialty channel’s top-selling brands and products in their respective categories.

## Top Soft Goods

TOP 5 BRANDS	
Specialty Channel Only	
1	Simms Fishing
2	Patagonia
3	Private Label
4	Orvis
5	Howler Brothers

TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	M's SolarFlex Hoody (Simms Fishing)	\$66.01
2	M's G3 Guide Jacket (Simms Fishing)	\$568.54
3	M's Simms, Challenger Jacket (Simms Fishing)	\$164.13
4	M's Cap Cool Dally Graphic Hoody - Relaxed (Pagagonia)	\$62.13
5	M's Bulkley Jacket (Simms Fishing)	\$337.58
6	M's Guide Pant (Simms Fishing)	\$95.38
7	M's Simms Challenger Bib (Simms Fishing)	\$160.92
8	M's Nano Puff Fitz Roy Trout Hoody (Patagonia)	\$240.26
9	M's Big Sky LS Shirt (Simms Fishing)	\$77.97
10	M's BugStopper Hoody (Simm Fishing)	\$78.76



# Top Wading

TOP 5 BRANDS	
Specialty Channel Only	
1	Simms Fishing
2	Orvis
3	Patagonia
4	Korkers
5	Redington



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	M's G3 Guide Stockingfoot (Simms Fishing)	\$626.31
2	G4Z Stockingfoot (Simms Fishing)	\$909.72
3	M's Freestone Stockingfoot (Simms Fishing)	\$292.20
4	M's Flyweight Boot (Simms Fishing)	\$209.90
5	M's Tributary Stockingfoot (Simms Fishing)	\$194.35
6	M's G3 Guide Pant (Simms Fishing)	\$520.64
7	M's G3 Guide Pant (Simms Fishing)	\$520.64
8	Clearwater Wader - Mens (Orvis)	\$234.69
9	M's Flat Sneaker (Simms Fishing)	\$174.95
10	M's G4 Pro Boot - Vibram (Simms Fishing)	\$357.02

# Top Reels

TOP 5 BRANDS	
Specialty Channel Only	
1	Lamson
2	Ross Reels
3	Sage
4	Abel
5	Orvis



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	Liquid 3-Pack Fly Fishing Reel & Spools (Lamson)	\$151.34
2	Guru S Reel (Lamson)	\$294.81
3	HYDROS REEL (Orvis)	\$265.75
4	Sage ESN Reels (Sage)	\$436.66
5	Evolution R Salt (Ross Reels)	\$766.49
6	Colorado (Ross Reels)	\$355.81
7	Sage SPECTRUM LT Reels (Sage)	\$349.51
8	Redington BEHEMOTH Reels (Redington)	\$126.58
9	Redington GRANDE Reels (Redington)	\$331.00
10	Redington TILT Reels (Redington)	\$268.00

# Top Rods

TOP 5 BRANDS	
Specialty Channel Only	
1	Sage
2	Scott Fly Rods
3	G. Loomis
4	R.L. Winston
5	Orvis



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	Sage R8 CORE Rods (Sage)	\$1,013.00
2	Sage SALT R8 Rods (Sage)	\$1,052.00
3	NRX+ FLY SALTWATER (G. Loomis)	\$933.00
4	Centric (Scott Fly Rods)	\$914.00
5	Sage SONIC Rods (Sage)	\$642.00
6	CLEARWATER FLY ROD (Orvis)	\$255.00
7	CONTACT II (Thomas & Thomas)	\$828.00
8	Sector (Scott Fly Rods)	\$1,018.00
9	ASQUITH SALTWATER (G. Loomis)	\$1,277.00
10	RECON FLY ROD (Orvis)	\$595.00

# Top Fly-Tying

TOP 5 BRANDS	
Specialty Channel Only	
1	Hareline Dubbin
2	Wapsi Fly
3	Umpqua Feather Merchants
4	Whiting Farms
5	Firehole Outdoors



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	#1 Hare's Mask (Hareline Dubbin)	\$5.82
2	#1 Hungarian Partridge Skin (Hareline Dubbin)	\$51.51
3	#2 Hares's Mask Natural (Hareline Dubbin)	\$4.16
4	#839 Streamer (Firehole Outdoors)	\$6.96
5	0.1mm Wire (Semperfli)	\$3.94
6	0.2mm Wire (Semperfli)	\$4.01
7	0.3mm Wire (Semperfli)	\$4.06
8	0.5mm Wire (Semperfli)	\$4.08
9	071 Offset Shank Worm Hook 1, 1/0, 2/0 (Gamakasu)	\$5.10
10	1 Main Pro Series Hooks (Main Pro Series)	\$3.45

# Top Lines

TOP 5 BRANDS	
Specialty Channel Only	
1	Scientific Angler
2	RIO
3	AirFlo
4	Orvis
5	Cortland Line Company



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	AMPLITUDE SMOOTH INFINITY TAPER (Scientific Angler)	\$88.25
2	RIO Premier Gold FlyLine (RIO)	\$89.03
3	RIO Elite RIO Gold FlyLine (RIO)	\$111.70
4	AMPLITUDE INFINITY (Scientific Angler)	\$114.80
5	AMPLITUDE SMOOTH TROUT TAPER (Scientific Angler)	\$88.01
6	AMPLITUDE MPX TROUT TAPER (Scientific Angler)	\$114.84
7	AMPLITUDE TROUT TAPER (Scientific Angler)	\$111.71
8	RIO ELITE PREDATOR FlyLine (RIO)	\$90.07
9	RIO Elite Grand FlyLine (RIO)	\$117.52
10	AMPLITUDE SMOOTH GRAND SLAM TAPER (Scientific Angler)	\$81.76

# Top Leaders & Tippet

TOP 5 BRANDS	
Specialty Channel Only	
1	RIO
2	Scientific Angler
3	Orvis
4	Umpqua Feather Merchants
5	Trouthunter



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	RIO Powerflex Trout Leader Leaders (RIO)	\$10.36
2	RIO Powerflex Plus Leaders (RIO)	\$12.24
3	RIO Fluoroflex Strong Tippet (RIO)	\$18.89
4	ABSOLUTE TROUT (Scientific Angler)	\$12.58
5	RIO Fluoroflex Saltwater Tippet (RIO)	\$22.42
6	RIO Powerflex Tippet (RIO)	\$5.61
7	RIO Fluoroflex BonefishSaltwater Leaders (RIO)	\$15.12
8	RIO Fluoroflex Trout Leaders (RIO)	\$9.34
9	SUPER STRONG PLUS LEADERS 2PK (Orvis)	\$9.34
10	Top Secret Fluoro-Ultra Premium Fluorocarbon (Cortland)	\$21.77

# Top Fishing Accessories

TOP 5 BRANDS	
Specialty Channel Only	
1	Fishpond
2	Loon Outdoors
3	New Phase
4	Umpqua Feather Merchants
5	Air-Lock



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	Nomad Emerger Net (Fishpond)	\$162.19
2	Nomad Mid-Length Net (Fishpond)	\$168.12
3	Nomad Native Net (Fishpond)	\$133.87
4	Nomad Hand Net (Fishpond)	\$132.93
5	Aquel (Loon Outdoors)	\$6.05
6	Tacky Pescador Fly Box (Fishpond)	\$43.09
7	Oros Strike Indicators (Oros)	\$8.20
8	Headgate Tippet Holder (Fishpond)	\$20.73
9	RIO Headgate Accessories (RIO)	\$43.04
10	RIO Trout Tippet Rings (RIO)	\$9.67

# Top Packs & Vests

TOP 5 BRANDS	
Specialty Channel Only	
1	Fishpond
2	Simms Fishing
3	Orvis
4	Patagonia
5	Umpqua Feather Merchants



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	Thunderhead Submersible Backpack (Fishpond)	\$295.53
2	Thunderhead Submersible Lumbar (Fishpond)	\$238.41
3	Thunderhead Submersible Sling (Fishpond)	\$244.44
4	Summit Sling -2.0 (Fishpond)	\$120.75
5	Cross-Current Chest Pack (Fishpond)	\$147.61
6	Freestone Sling Pack (Simms Fishing)	\$138.82
7	Switchback Pro Wading System (Fishpond)	\$159.99
8	Thunderhead Chest Pack (Fishpond)	\$176.14
9	Umpqua ZS2 Overlook 500 Chest Pack Kit (UmpquaFeather)	\$138.67
10	ORVIS BUG OUT BACKPACK (Orvis)	\$202.14



# Top Luggage & Cases

TOP 5 BRANDS	
Specialty Channel Only	
1	Fishpond
2	Simms Fishing
3	Patagonia
4	Orvis
5	Riversmith



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	Grand Teton Rolling Luggage (Fishpond)	\$397.66
2	Black Hole Wheeled Duffel 100L (Patagonia)	\$407.18
3	Dakota Carry-On Rod & Reel Case (Fishpond)	\$185.80
4	ORVIS CARRY IT ALL (Orvis)	\$217.48
5	Riversmith River Quiver (Riversmith)	\$731.28
6	GTS Rod & Reel Vault (Simms Fishing)	\$196.62
7	Cutbank Gear Bag (Fishpond)	\$286.78
8	Thunderhead Large Submersible Duffel (Fishpond)	\$379.18
9	Taco Bag (Simms Fishing)	\$42.55
10	Thunderhead Rod & Reel Case-Eco Shale (Fishpond)	\$198.53

# Top Rod/Reel Combos

TOP 5 BRANDS	
Specialty Channel Only	
1	Orvis
2	Redington
3	Echo
4	Sage
5	(Various)



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	CLEARWATER FLY ROD OUTFIT (Orvis)	\$418.11
2	Sage FOUNDATION OUTFIT Outfits (Sage)	\$650.90
3	Redington FIELD KITS Outfits (Redington)	\$371.19
4	ENCOUNTER FLY ROD OUTFIT (Orvis)]	\$201.45
5	Redington PATH COMBO Outfits (Redington)	\$174.54
6	Redington ORIGINAL KIT Outfits (Redington)	\$243.61
7	Redington TOPO Designs KIT Outfits (Redington)	\$421.68
8	Redington VICE COMBO Outfits (Redington)	\$194.26
9	Orvis Encounter Package - New (Orvis)	\$390.09
10	Clearwater Outfit 9' 5wt (Orvis)	\$174.06

# Top Tools

TOP 5 TOOLS BRANDS	
Specialty Channel Only	
1	Loon Outdoors
2	Simms Fishing
3	Fishpond
4	Orvis
5	Dr. Slick



TOP 10 SELLING TOOLS PRODUCTS		
Specialty Channel Only		
1	Pro Nipper (Simms Fishing)	\$84.90
2	Arrowhead Retractor (Fishpond)	\$29.28
3	Flyweight Plier (Simms Fishing)	\$178.50
4	Van Staal Big Game Plier Set (Van Staal)	\$378.50
5	Guide Nipper (Simms Fishing)	\$57.52
6	Swivel Retractor (Fishpond)	\$18.87
7	COMFY GRIP KIT (Orvis)	\$38.80
8	Rogue Quickdraw Forceps (Loon Outdoors)	\$26.48
9	Rogue Zinger (Loon Outdoors)	\$13.66
10	Freestone Nipper (Simms Fishing)	\$24.26

# Top Eyewear

TOP 5 EYEWEAR BRANDS	
Specialty Channel Only	
1	Costa Del Mar
2	Smith Optics
3	Suncloud Optics
4	Bajio
5	Clic



TOP 10 SELLING EYEWEAR PRODUCTS		
Specialty Channel Only		
1	Guides Choice ,including XL (Smith Optics)	\$235.85
2	Redding (Smith Optics)	\$253.47
3	Bales Beach (Bajio)	\$229.01
4	Reefton (Costa Del Mar)	\$268.64
5	Loveseat (Suncloud Optics)	\$53.05
6	BlackFin Pro (Costa Del Mar)	\$266.80
7	Longfin (Smith Optics)	\$206.23
8	Fantail Pro (Costa Del Mar)	\$273.37
9	Riptide (Smith Optics)	\$227.64
10	Barra (Smith Optics)	\$189.28

# Top Watercraft

TOP 5 BRANDS	
Specialty Channel Only	
1	NuCanoe
2	Big Adventures
3	Johnson Outdoors
4	Water Master
5	Hobie



TOP 10 SELLING PRODUCTS		
Specialty Channel Only		
1	WaterMaster Kodiak Fishing Rafts (Water Master)	\$1,861
2	Water Master Kodiak Raft Packages (Water Master)	\$3,085
3	Xi3 GPS Kayak 36" (Attwood)	\$1,257
4	2023 UNLIMITED Army Camo (NuCanoe)	\$1,607
5	2023 UNLIMITED Thunderstorm (NuCanoe)	\$1,622
6	2023 UNLIMITED Tundra (NuCanoe)	\$1,657
7	PIVOT Drive UNLIMITED (NuCanoe)	\$1,134
8	Hobie Pro Angler 14 360 Mike Iaconelli Special Edition (Hobie)	\$5,799
9	2023 Sportsman AutoPilot 120 Ember (Johnson Outdoors)	\$3,770
10	Stiffy Guide Push Pole w SS Spike (Stiffy)	\$1,242

## A NOTE ON THE FLIES CATEGORY

FLIES are obviously a very important category— customers come back every week for fresh patterns of what the fish are eating. But it is a challenged category from an analytical perspective. Flies are typically not coded with UPC or SKU numbers, and retailers often enter flies into their POS systems with nondescript names. As a result, the FLIES category is somewhat of a “Wild West” across the channel, and for the time being, it cannot be tracked or analyzed in the manner that all other categories are analyzed.

But TrackFly intends to engage both Brands and Retailers on longer-term strategies to better organize and analyze the FLIES category.

# Conclusion

Analysis of the core sales channel for Fly Fishing provides solid evidence of a healthy industry, despite the chaotic consumer demand and supply chain anomalies of 2021. Fly fishers are spending discretionary dollars with specialty retailers to show slightly stronger year-over-year growth than in other outdoor segments, and TrackFly is building the data assets to further study those trends. Some evidence also suggests that new consumers have been contributing to some of the channel's sales growth, particularly since Covid.

TrackFly's base of participating retailers is currently at a level that demonstrates statistical significance, but the intent is to grow that retailer base to well over 15% of channel by end of 2023. Retailers get access to useful market data just by participating.

TrackFly also plans to add depth and descriptive attributes to the product data as we move into 2024, which will make the analyses and reports even more insightful, particularly for brands.

And so, TrackFly believes that proactive retailers and competitive brands that familiarize themselves with these insights and analyses will be better equipped to understand both (a) when they are achieving some measurable effectiveness with their Go-to-Market actions, and (b) what further actions and up-and-coming products might be working elsewhere in the industry.

Our conclusion: the core channel of our industry is healthy and strong, and we now have data and analytical tools that can help us all make more informed decisions going forward, to better serve our customer base, and to be more competitive and profitable as businesses.

**Contact TrackFly to receive monthly market insights that go beyond this summary and reveal additional information such as...**

**Market Share**

Brand Analysis

**20-100**

Top Selling Products

**Category Growth**

Year over Year