



EPOS REPORT

2025

APPAREL

Apparel accounts for **26.68%** overall TGI Business

This is up 0.60% from 2024 (26.08%)

The Top 10 brands by market share for 2025

<u>BRAND</u>	<u>2025%</u>	<u>2024 %</u>
PETER MILLAR	15.59%	+0.85%
FOOTJOY	10.24%	-0.20%
GLENMUIR	5.09%	-1.18%
ADIDAS	4.24%	+0.82%
UNDER ARMOUR	3.99%	-1.40%
GALVIN GREEN	3.72%	-0.81%
PING APPAREL	3.38%	-0.47%
SUNDERLAND	2.36%	-0.80%
J LINDBERG	1.69%	+0.12%
TRAVISMATHEW	1.25%	-0.56%

The top 5 brands command **39.15%** of the apparel market

This is down 2.23% from 2024 (41.38%)

The top 10 brands command **51.55%** of the apparel market

This is down 3.64% from 2024 (55.19%)

APPAREL MARGIN AVERAGE

44.90%

This is up 1.52% from 2024 (43.38%)

APPAREL

The top 5 brands by margin% for 2025

<u>BRAND</u>	<u>GM %</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
PETER MILLAR	51.54%	+0.86%	15.59%	51.54%
TRAVISMATHEW	48.80%	-0.70%	1.25%	48.80%
IVANHOE	46.86%	+0.23%	0.45%	50.86%
SLAITH	46.14%	-1.08%	0.51%	50.14%
RALPH LAUREN	44.71%	+3.83%	0.60%	44.71%

The bottom 5 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS %</u>	<u>AFTER S/DD DISCOUNTS %</u>
ORIGINAL PENGUIN	31.13%	+1.70%	0.52%	34.13%
ROHNISCH	33.14%	+2.32%	0.80%	35.14%
PING APPAREL	33.67%	+2.05%	3.38%	38.67%
CALLAWAY APPAREL	35.09%	-0.78%	1.12%	38.09%
UNDER ARMOUR	35.20%	+0.60%	3.99%	38.20%

HARDWARE

Hardware accounts for **28.34%** of overall TGI Business

This is down 0.34% from 2024 (28.68%)

The top 5 brands by market share for 2025

<u>BRAND</u>	<u>2025%</u>	<u>2024 %</u>
PING	26.98%	+0.49%
TAYLORMADE	24.68%	-1.13%
TITLEIST	18.87%	-0.06%
CALLAWAY	11.38%	-1.35%
MIZUNO	4.25%	+0.54%

The top 5 brands command **86.17%** of the hardware market

This is down 1.49% from 2024 (87.66%)

HARDWARE MARGIN AVERAGE

25.96%

This is down 0.09% from 2024 (26.05%)

The top 5 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS %</u>	<u>AFTER S/DD DISCOUNTS %</u>
SRIXON	32.89%	-4.73%	2.93%	36.89%
CLEVELAND	32.41%	-0.96%	1.35%	36.41%
WILSON	30.70%	+1.63%	1.76%	32.70%
COBRA	28.56%	+0.50%	2.34%	30.56%
ODYSSEY	27.78%	+4.24%	2.84%	27.78%

HARDWARE

The bottom 5 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS %</u>	<u>AFTER S/DD DISCOUNTS %</u>
YONEX	17.58%	-8.44%	0.17%	20.58%
TITLEIST	22.90%	+0.04%	18.87%	24.90%
MIZUNO	23.09%	-4.33%	4.25%	25.09%
TAYLORMADE	25.40%	-0.99%	24.68%	26.40%
PING	26.36%	+0.15%	26.98%	31.36%

* Please note the average TGI club partner with **Titleist** received **5.9%** retro in 2024, this would make their GM% after discounts [30.80%](#)

BALLS

Balls accounts for **8.54%** of overall TGI Business

This is down 0.26% from 2024 (8.80%)

The top 5 brands by market share for 2025

<u>BRAND</u>	<u>2025%</u>	<u>2024 %</u>
TITLEIST	52.92%	-0.38%
TAYLORMADE	20.98%	+2.11%
CALLAWAY	9.84%	-1.81%
SRIXON	9.66%	-0.22%
WILSON	1.62%	+0.32%

The top 5 brands command **95.02%** of the balls market

This is up 0.03% from 2024 (94.99%)

BALLS MARGIN AVERAGE

30.93%

This is down 0.08% from 2024 (31.01%)

The top 3 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
SRIXON	41.23%	-4.06%	9.66%	45.23%
WILSON	36.65%	+5.43%	1.62%	36.65%
CALLAWAY	31.06%	+0.84%	9.84%	31.06%

The bottom 3 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
MIZUNO	22.99%	-5.59%	0.87%	24.99%
TITLEIST	27.72%	+0.67%	52.92%	29.72%
TAYLORMADE	28.37%	-0.93%	20.98%	29.37%

* Please note the average TGI ball partner with **Titleist** received **6.8%** retro in 2024, this would make their GM% after discounts **36.52%**

SHOES

Shoes accounts for **3.85%** of overall TGI Business

This is down 0.60% from YTD 2024 (4.45%)

The top 5 brands by market share for 2025

<u>BRAND</u>	<u>2025%</u>	<u>2024 %</u>
FOOTJOY	50.83%	-1.21%
ADIDAS	14.59%	+2.45%
ECCO	9.34%	+0.69%
UNDER ARMOUR	9.20%	-0.39%
SKECHERS	5.73%	-2.67%

The top 5 brands command **89.69%** of the shoes market

This is down 1.12% from 2024 (90.81%)

SHOES MARGIN AVERAGE

27.40%

This is up 0.50% from 2024 (26.90%)

The top 3 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
UNDER ARMOUR	32.56%	-0.03%	9.20%	35.56%
G/FORE	31.20%	-4.40%	0.33%	31.20%
NIKE	30.63%	-4.08%	0.72%	30.63%

The bottom 3 brands by margin% for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
CALLAWAY	13.50%	-7.98%	0.22%	13.50%
TRAVISMATHEW	22.99%	-4.23%	0.33%	22.99%
FOOTJOY	25.25%	+1.42%	50.83%	27.25%

FULL REPORT

Breakdown for TGI Business is as follows for 2025

<u>BRAND</u>	<u>% 2025</u>	<u>% 2024</u>
ACCESSORIES	8.55%	0.45%
BAGS	3.41%	-0.03%
BALLS	8.54%	-0.26%
CLOTHING	1.61%	-0.58%
CLUBS	1.36%	0.19%
DMD'S	0.69%	0.04%
ELECTRIC TROLLEYS	2.46%	-0.02%
FOOD AND DRINK	6.53%	0.24%
GLOVES	3.04%	0.04%
HEADWEAR	3.78%	0.49%
IRONS	10.02%	-0.09%
JUNIOR	0.66%	0.05%
OTHER	3.16%	-0.05%
PULLOVERS	7.65%	0.10%
PUTTERS	3.12%	0.45%
REPAIR	2.42%	-0.04%
SECOND HAND	1.05%	0.00%
SHIRTS	8.03%	1.08%
SHOES	3.85%	-0.60%
TROLLEYS	0.60%	-0.12%
TROUSERS	1.29%	-0.08%
WEATHERWEAR	4.32%	-0.41%
WEDGES	2.72%	-0.09%
WOODS	11.12%	-0.80%

FULL REPORT

Top 10 brands by market share 2025

<u>BRAND</u>	<u>% 2025</u>	<u>% 2024</u>
TITLEIST	11.63%	-0.28%
TAYLORMADE	9.96%	-0.18%
PING	8.86%	+0.06%
FOOTJOY	6.44%	-0.44%
CALLAWAY	4.91%	-0.54%
PETER MILLAR	4.43%	+0.14%
POWAKADDY	2.20%	-0.05%
MASTERS	1.98%	-0.10%
ADIDAS	1.83%	+0.30%
MOTOCADDY	1.82%	-0.01%

The top 10 brands control **52.32%** of overall TGI Business

This is down 3.34% from 2024 (55.66%)

MARGIN AVERAGE

37.18%

This is down 0.03% from 2024 (37.21%)

FULL REPORT

Top 10 brands by margin for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
PATERSON	56.64%	+3.70%	0.54%	56.64%
PETER MILLAR	51.65%	+0.59%	4.43%	51.65%
MASTERS	49.69%	+1.38%	1.98%	57.69%
TRAVISMATHEW	47.84%	-2.03%	0.35%	47.84%
ISLAND GREEN	41.68%	+0.83%	0.25%	42.68%
GLENMUIR	39.39%	-0.33%	1.40%	44.39%
GALVIN GREEN	37.69%	+1.56%	1.09%	37.69%
SRIXON	37.46%	-4.66%	1.81%	41.46%
J LINDBERG	37.22%	+2.11%	0.47%	39.22%
CALLAWAY APPAREL	37.01%	+1.14%	0.31%	40.01%

The bottom 10 brands by margin for 2025

<u>BRAND</u>	<u>GM%</u>	<u>2024 %</u>	<u>MS%</u>	<u>AFTER S/DD DISCOUNTS %</u>
POWAKADDY	22.71%	-0.56%	2.20%	24.21%
MOTOCADDY	24.10%	-1.60%	1.82%	24.10%
MIZUNO	24.49%	-2.89%	1.58%	26.49%
BUSHNELL	24.91%	+1.97%	0.28%	24.91%
TITLEIST	26.02%	+0.17%	11.63%	28.02%
TAYLORMADE	26.16%	-0.89%	9.96%	27.16%
PING	26.84%	+0.03%	8.86%	31.84%
ODYSSEY	28.29%	+4.11%	0.84%	28.29%
CALLAWAY	28.78%	+1.66%	4.91%	28.78%
ECCO	28.87%	-3.21%	0.36%	33.87%

TOTAL AVERAGE SHOP (2025)

£297,311

This is up 9.98% from 2024 (£270,320)