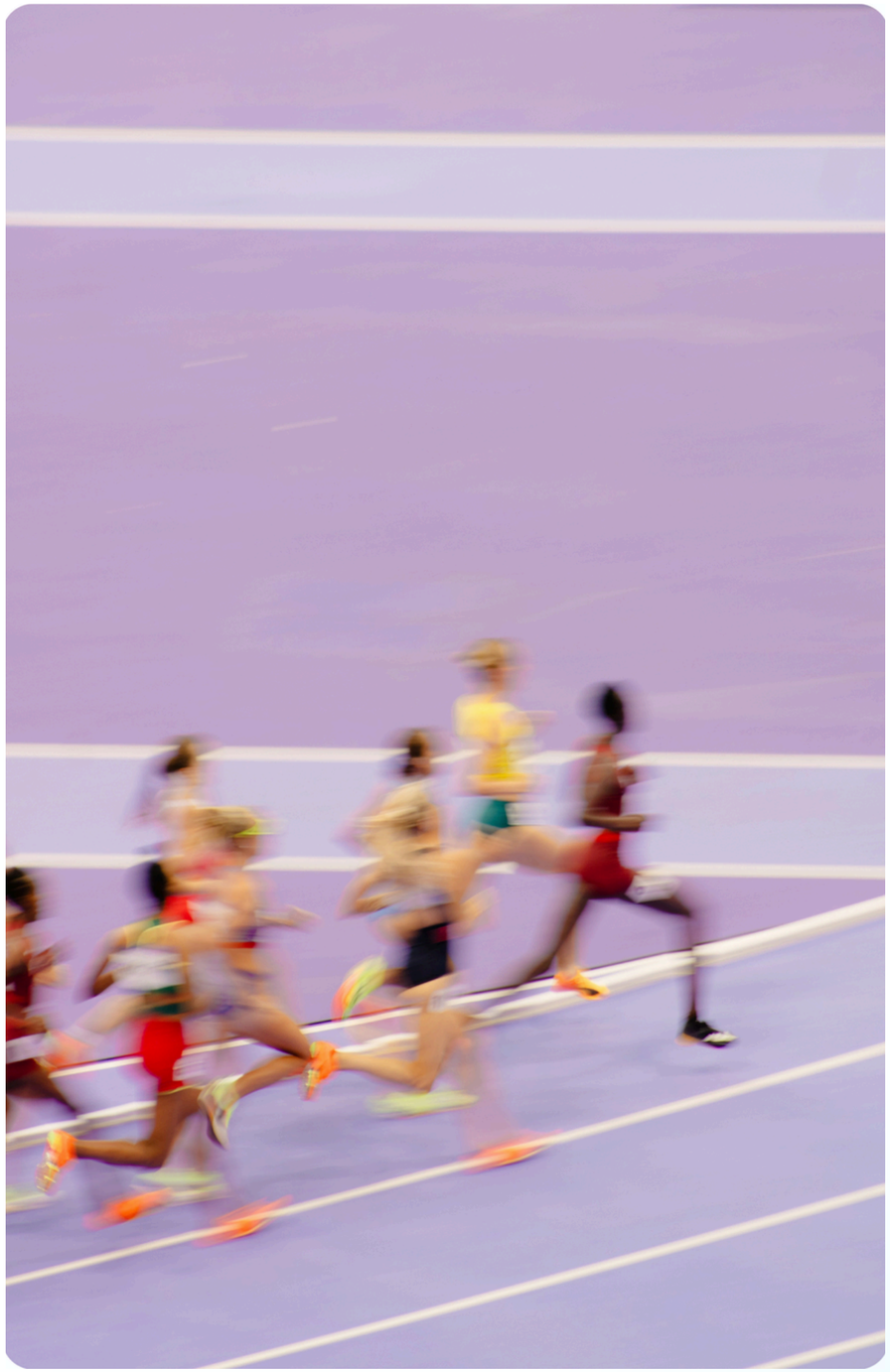
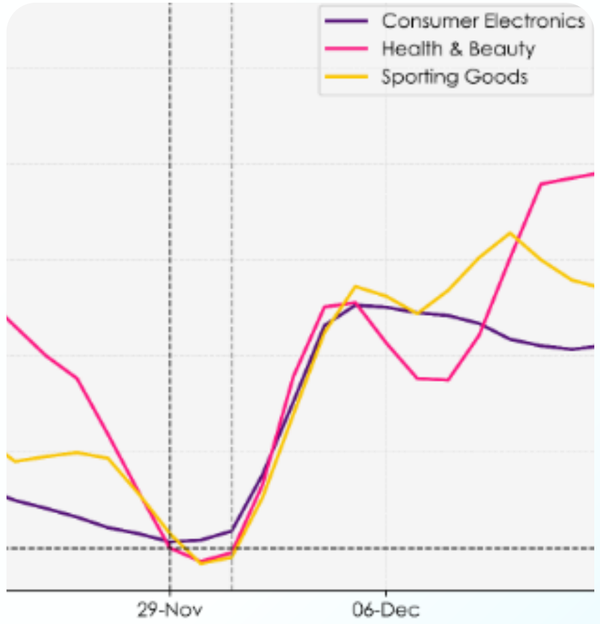


omniaretail





Holiday Pricing Report 2026: Sporting Goods

Pricing data, trends and forecasts for Europe and the US

✦ KEY FINDINGS

Black Friday is now Black November

iDEAL processed 37.8m payments in the week before Black Friday 2025, up from 28.6m in 2023.

More shoppers, smaller totals

HDE forecast German BF/CM spend down almost 2% in 2025, even as more people planned to take part.

Footwear is the weak spot

JD Sports and Dick's both flagged heavy promotions in athletic footwear.

Regulators are watching

The Dutch ACM found misleading discount claims at 18 of 24 large sellers before Black Friday 2025.

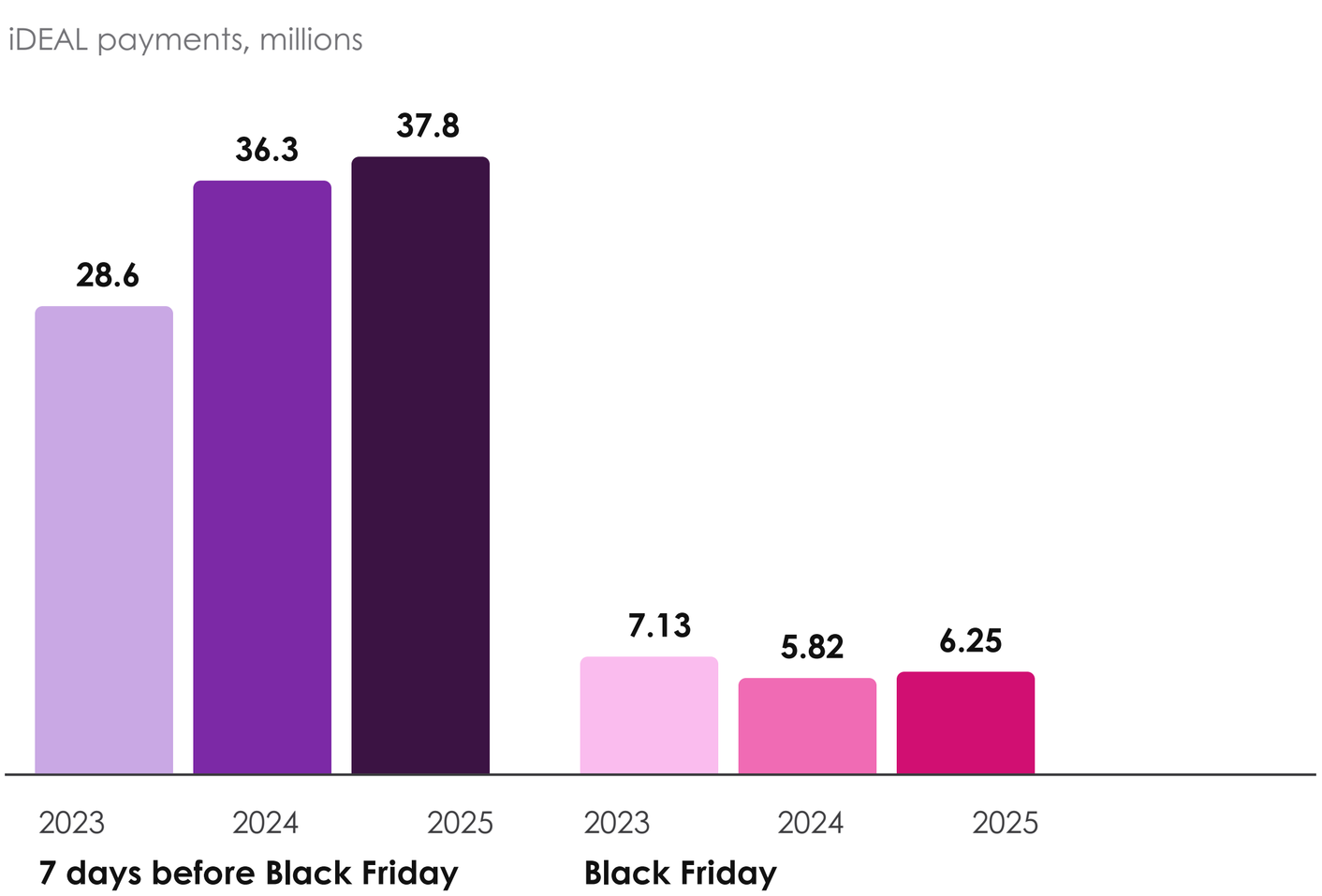
Sporting goods move differently

Prices rose before they fell, and the under-€50 tier took the most and deepest cuts.

omniaretail

Europe Up Close: Netherlands

The run-up week now outweighs Black Friday itself



+32%

run-up week payments, 2023 to 2025

5.5m

iDEAL payments on Cyber Monday 2025

~40%

of Dutch consumers planned to buy nothing on Black Friday (NIQ)

omniaretail

EUROPE UP CLOSE

Shoppers turned up for deals, but spent carefully

GERMANY

€5.8bn

BF/CM 2025 forecast, down almost 2%. The first decline since HDE tracking began in 2016.

GERMANY

54%

said they would use Black Friday for Christmas shopping.

NETHERLANDS

+9%

cross-border purchases in 2025, with Chinese webshops taking 31% of them.

UNITED KINGDOM

+62%

Black Friday transactions vs the daily average. The busiest day of 2025 so far.

UNITED KINGDOM

68%

of adults doubted the real value of BF/CM deals.

NETHERLANDS · ACM

18 of 24

large sellers made misleading price claims, mostly around the 30-day 'from' price.

Europe Up Close: Sports Retailers

Mass sports retail is discounting, premium is holding price

JD Sports

−3.4%

Europe like-for-like sales, 9 weeks to Jan 3, 2026

−5.3%

UK like-for-like sales, same period

−3.3%

Europe like-for-like sales, 26 weeks to Aug 1, 2026

~−3%

footwear sales, 60% of the group. Apparel grew about 4%.

On Running

+15.4%

EMEA net sales, Q2 2026

65.4%

group gross margin, Q2 2026, while absorbing higher US tariffs

The US and the Brands

US holiday spend is still forecast to grow

INDICATOR	2026 FORECAST
US online holiday sales (Nov 1 to Dec 31)	**$275.1bn, +6.7%**
Peak US sporting goods discount	**19% off list, best deals on Thanksgiving**
US average gift spend	**$708, down 2% from $721**
US total holiday retail sales	**+4% to +4.8%**
US retail sales ex autos and gas (Nov 1 to Dec 24)	**+5.5%; online +11%, stores +3.6%**

Footwear is the pressure point: Dick's says athletic footwear and apparel became increasingly promotional in Q2 FY26, and cut its Foot Locker outlook to between −2% and flat.

EU/UK vs US

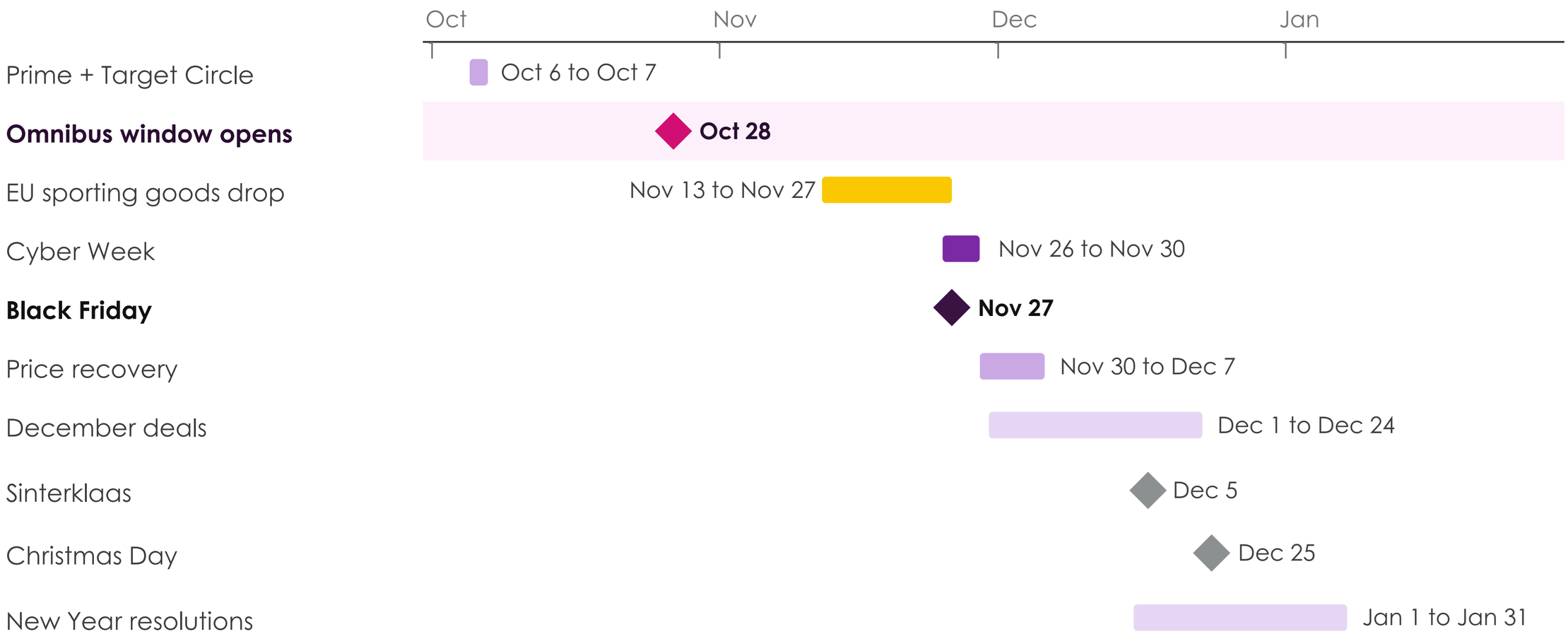
Same hunt for value, different peak days

	Netherlands	Germany	UK	US
Peak moment, 2025	Week before Black Friday: 37.8m iDEAL payments	Black Friday: 48% planned to shop it	Black Friday: +62% transactions	Cyber Monday: $14.25bn online
Spend direction	Online €35.7bn (−1%), products +2%	BF/CM €5.8bn, about −2%	BF weekend £9.5bn, +4.2%	Cyber Week $44.2bn, +7.7%
Shopper mood	Nearly 40% planned to buy nothing	More buyers, lower total spend	68% doubt the value of deals	2026 gift budgets forecast −2%
Discount rules	**EU 30-day lowest price, enforced by the ACM**	**EU 30-day lowest price**	Not covered	Not covered

omniaretail

Holiday Calendar, Oct 2026 to Jan 2027

EU reference prices lock a month before Black Friday



The 30-day window runs back from the day each price cut starts: a cut from Nov 13 looks back to Oct 14. The EU drop span is an estimate based on last year's two-week decline.

omniaretail

OMNIA DATA · BLACK FRIDAY 2025

What Omnia tracked around Black Friday 2025

6 weeks
of daily pricing data around Black Friday

~60k products
tracked daily

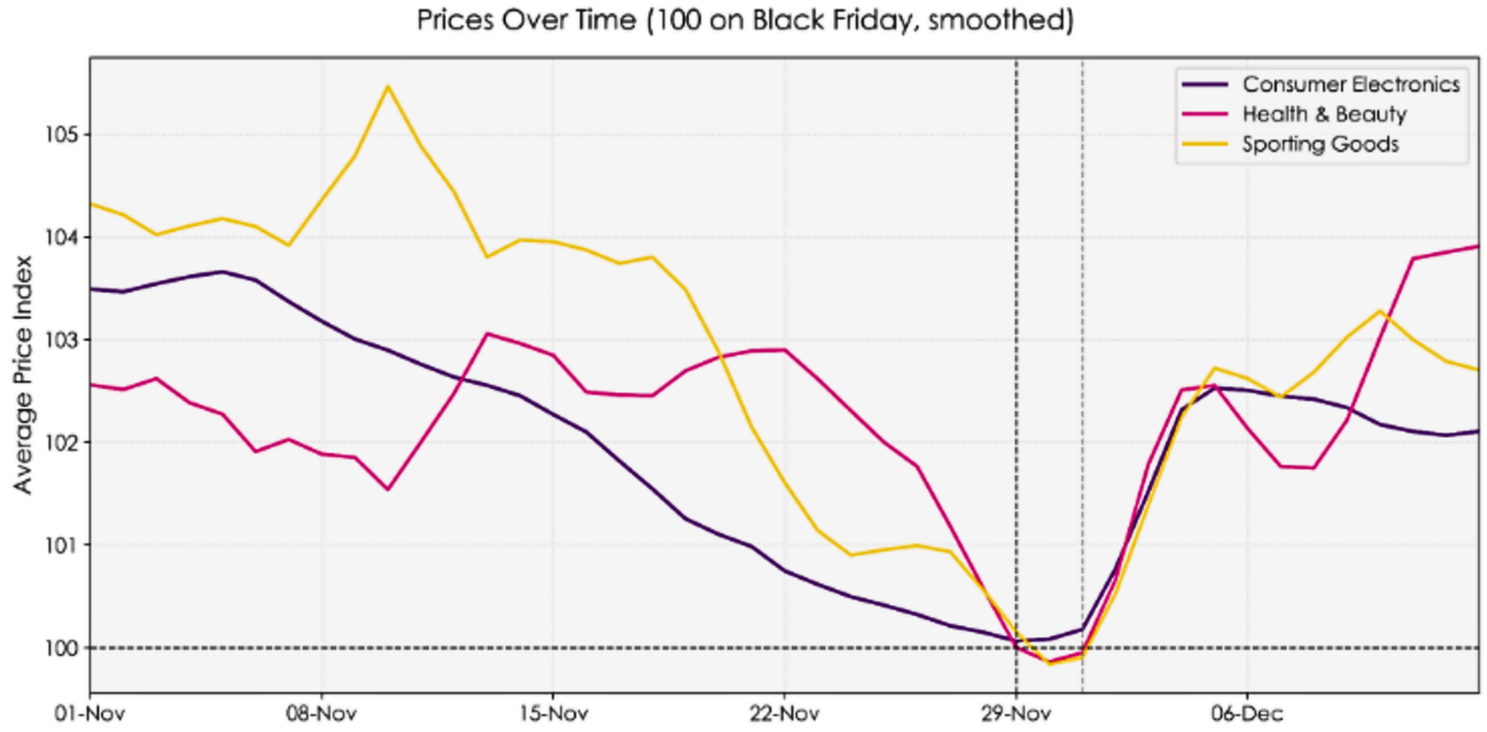
3 categories
Consumer Electronics, Sporting Goods, Health & Beauty

DE + NL
German and Dutch markets

omniaretail

Black Friday Insights

Sporting goods prices rose before they fell



Sporting Goods

Prices climb for ~2 weeks, peak ~1 month before Black Friday, then drop sharply in the final 2 weeks.

Consumer Electronics

Earliest and most gradual decline.

Health & Beauty

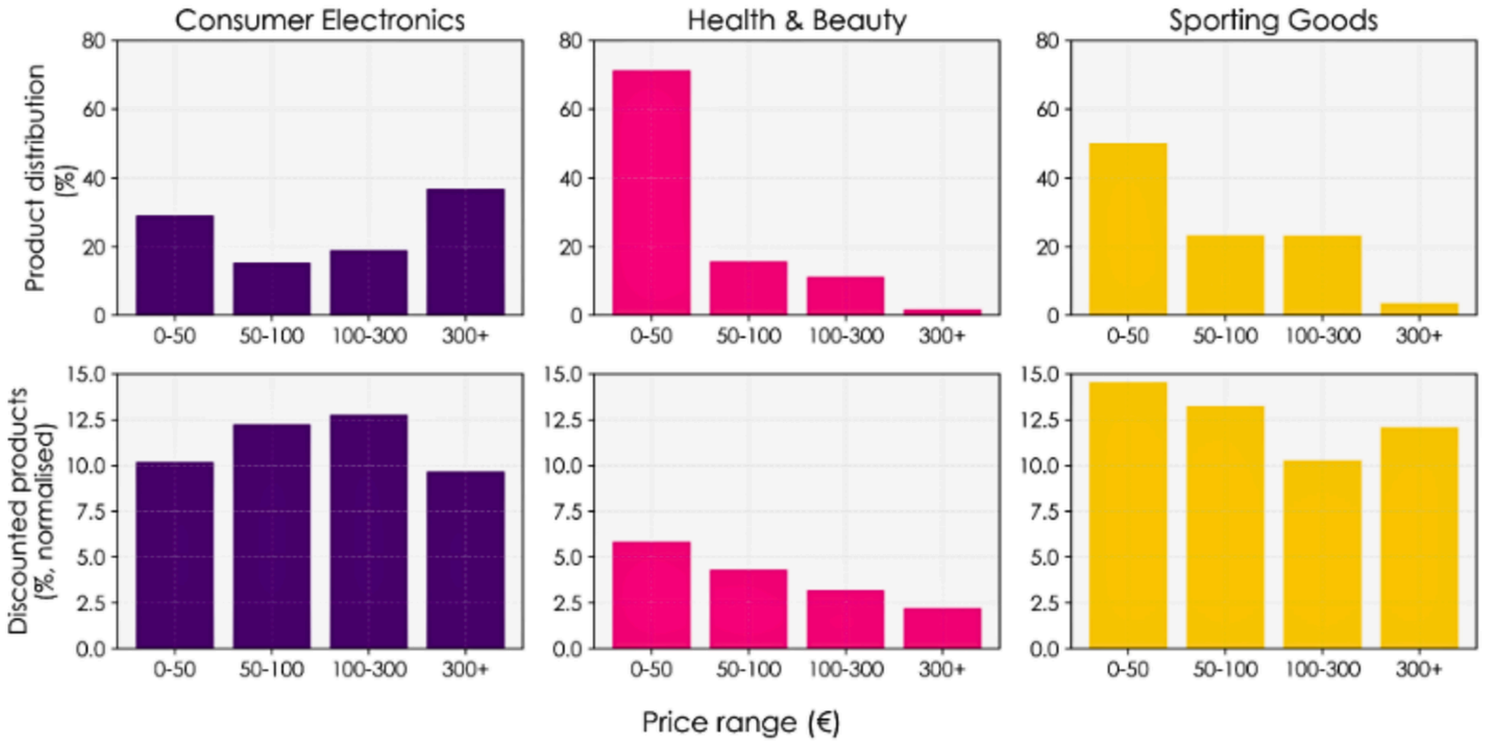
Flat for most of the window, sharp drop in the final week.

A category that peaks a month out needs its 30-day reference prices checked line by line.

omniaretail

Black Friday Insights

Cheaper sporting goods are discounted more often



~50%

of the sporting goods catalog sits under €50, and that tier saw the most discount activity.

71%

of Health & Beauty sits under €50, with the same skew.

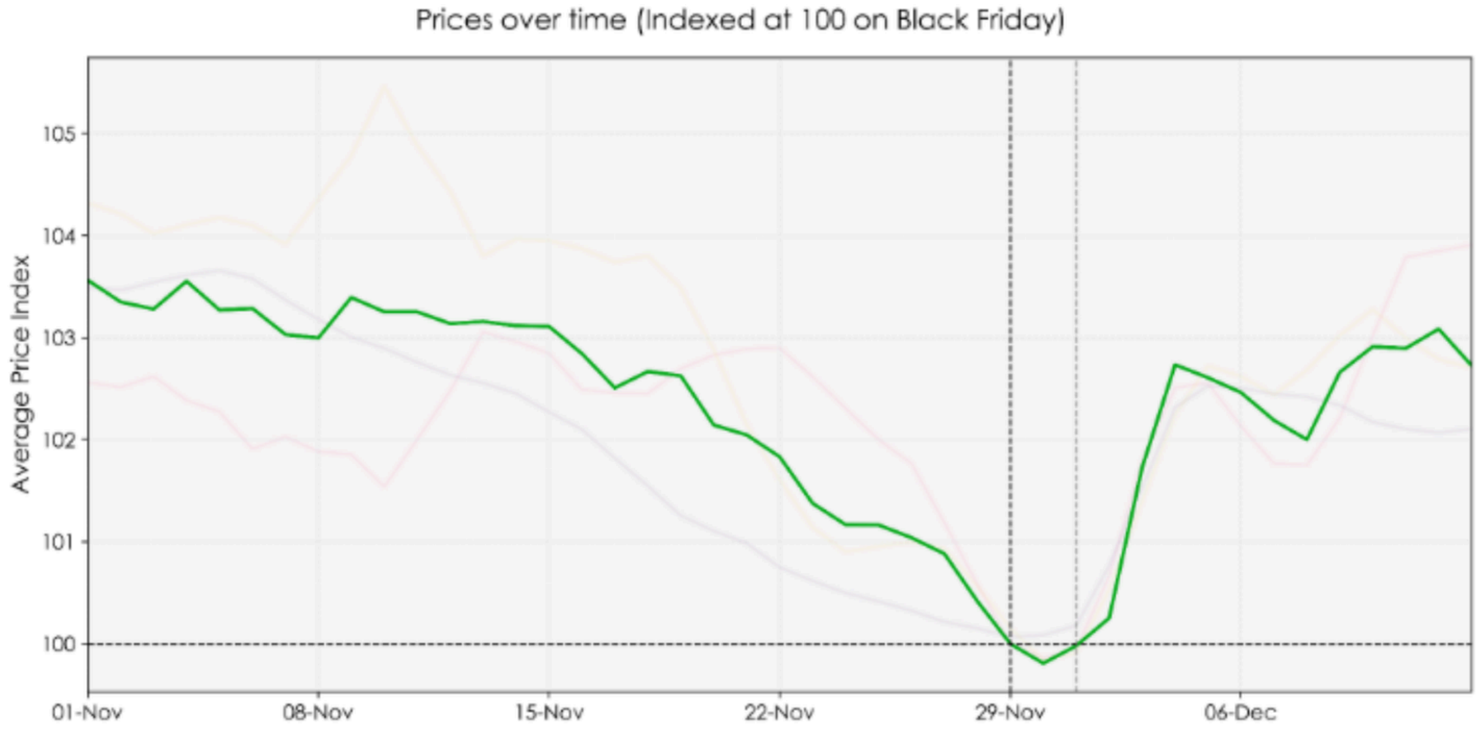
37%

of Consumer Electronics sits above €300. No strong skew once normalised.

omniaretail

Black Friday Insights

Prices slide two weeks out and recover within a week



2+ weeks
before Black Friday, prices started moving down.

102–103
index level reached within about a week, most of it around Cyber Monday.

omniaretail

Black Friday Insights

Competition flattens discounts



10–20% where products with dozens of competing offers cluster

40–60% cuts appear almost only on products with few competing offers

omniaretail

Forecast

What sporting goods pricing will likely look like in 2026

PREDICTION	CONFIDENCE	BASED ON
Shoppers spread purchases across November again	High	iDEAL 2023–2025, NIQ
Prices firm into early Nov, then fall sharply Nov 13–27	Medium	Omnia Black Friday 2025 data
Athletic footwear sees the deepest, earliest markdowns	Medium-high	Dick's, JD Sports
Products under €50 carry the most and steepest discounts	High	Omnia price-tier data
Highly compared SKUs stay at 10–20% off; 40%+ on niche lines	High	Omnia competition vs discount data
Prices recover by about Dec 7	Medium	Omnia price index, 2025
Early December stays soft in Europe, especially the Netherlands	Medium	JD Sports, ING
More EU scrutiny of strike-through prices	High	ACM: 18 of 24 sellers in 2025
Premium running and outdoor brands hold list price	Medium	On Q2 2026: 65.4% gross margin
US sporting goods discounts peak around 19%, up from 17%	High	Adobe 2026 forecast vs 2025 recap

Pricing Playbook

Eight steps for sporting goods brands and retailers

01

Lock reference prices 30 days before each cut

Oct 28 for a Black Friday price, Oct 14 for a cut that starts Nov 13.

02

Treat strike-through and RRP prices as audit items

Most ACM findings concerned the 'from' price.

03

Split the range into three tiers

Under €50 carries volume discounts, mid-price follows the market, premium holds price.

04

Match the market on high-competition SKUs

Discounts cluster at 10–20%; going deeper buys little extra visibility.

05

Use niche SKUs for headline deals

40%+ cuts sat almost entirely on products with few competing offers.

06

Plan for a long run-up, then a soft early December

Budget promotions across both windows, with Sinterklaas on Dec 5.

07

Plan the recovery as carefully as the drop

Schedule step-backs from Cyber Monday.

08

Make product data agent-readable

Clean, current price and availability data is what an AI agent compares.

omniaretail

Talk to one of our consultants about dynamic pricing.

Request a demo

Sources: Omnia Retail Black Friday 2025 data, iDEAL, NIQ, Thuiswinkel Markt Monitor, ACM, HDE, Barclays, Sensormatic, JD Sports, On, Dick's Sporting Goods, Adobe, PwC.