


THE FINANCIAL AND GEOGRAPHICAL CONCENTRATION OF THE SOCCER UNIFORM INDUSTRY – A TRIBUTE TO PETER DONNELLY

A CONCENTRAÇÃO FINANCEIRA E GEOGRÁFICA DA INDÚSTRIA DE UNIFORMES DE FUTEBOL – UM TRIBUTU A PETER DONNELLY 

LA CONCENTRACIÓN FINANCIERA Y GEOGRÁFICA DE LA INDUSTRIA DE UNIFORMES DE FÚTBOL – UN TRIBUTU A PETER DONNELLY 

 <https://doi.org/10.22456/1982-8918.125939>

 **Guilherme Reis Nothen*** <nothen@hotmail.com>

*Secretaria de Estado de Educação do Distrito Federal (SEEDF). Brasília, DF, Brazil

Abstract: This essay pays tribute to Peter Donnelly, distinguished contributor to the development of the sociology of sport, by revisiting a prediction that he made in the 1980s, concerning the growing effects of commercialization in soccer. By looking at the official equipment provider of numerous soccer clubs and national soccer teams, totaling more than 250 cases, this research hints at the extent of the financial and geographical concentration of this branch of industrial activity. The paper then argues that, from the standpoint of the material production of equipment, the wide regional and national diversity of the world of professional soccer collapses into a rather homogeneous arena, in which a small number of multinational companies compete for hegemony – with clubs and national teams functioning, in essence, as representatives of the interests of large conglomerates.

Keywords: Soccer. Sports equipment. Manufacturing industry. Uniforms.

Received in: 30 Aug. 2022
Approved in: 3 Nov. 2022
Published in: 27 Dec. 2022



This is an article published in open access under the Creative Commons Attribution 4.0 (CC BY 4.0)

1 INTRODUCTION

Sociological interpretations presuppose some degree of speculation about the future – an attempt to apprehend how the social and political dynamics under consideration are more likely to unfold. In most cases, sociological predictions derive from a combination of empirical and theoretical elements (COLLINS, 1995), and are presented as the logical outcome of tendencies that have been objectively identified.

Sociological questions, however, cannot always be addressed by looking at specific, well-delimited branches of reality. The wider these queries become, the more conceptual and empirical ground the researcher is expected to cover in seeking to adequately account for them. In this broadening process, the answers that one is able to formulate gradually shed some of their precision, and so do the sociological predictions associated with them. In the domain of macro-sociology, as Charles Tilly (1995, p. 1602) notes, it is important to bear in mind that the “social world” does not actually fall into “neatly recurrent structures and processes”, causing predictions about it to be significantly more elusive, as compared to other branches of science.

Yet, not all sociological forecasts are developed in a formal, thoroughly-substantiated manner. Sometimes these forecasts are simply articulated as general impressions, based on the experience or intuition of researchers. Randall Collins (1995) refers to these as “sociological guesses”, in an effort to set them apart from more empirically and theoretically grounded predictions.

Sociological guesses are not, generally speaking, particularly well-suited to the pages of academic journals, since these assumptions tend to be, in large part, more speculative than factual. Adhering to long-established editorial policies that constitute foundational aspects of the academic world as it is presently organized, periodicals are prone to feature works that prioritize evidence and fully-developed theoretical arguments; whereas propositions of this type are perhaps best conceived as thought experiments – whereby it is possible to push stimulating lines of thinking to the edge, in order to contemplate what the results of social and political tendencies would turn out to be, if these were to follow their current paths to their ultimate conclusions.

However, while similar conjectures, as a rule, appear rarely in more formal publications, they are far from rare. The field of sports studies, as any other sociocultural domain of inquiry, harbors various such sociological guesses, covering a wide diversity of themes. These types of ideas may be said to represent an integral part of the ‘everyday talk’ of the field, be it in discussions carried out during conferences and scholarly meetings or, most commonly, within departments that bring together like-minded colleagues. In these smaller, more intimate forums, the cogency of bold forecasts can be first tested, before one chooses whether these are hypotheses worth developing and pursuing any further.

Given the highly contentious and volatile nature of social development, it is not uncommon that these raw prognostications would fall off the mark, which is something that tends to be easier to verify when it comes to interpretations uttered further back in the past. It is precisely one of such apparently misplaced forecasts that I would like to revisit in this piece.

For several years, starting in the early 2010s, I was fortunate enough to study in the department where Peter Donnelly worked – a scholar whose contributions to the sociology of sport are certainly beyond reproach. It was during one of our latter informal conversations that he first told me about a sociological guess that he had formulated a few decades earlier, which struck me as one of the most creative, provocative lines of reasoning that I ever came across in the field of sports studies. It goes as follows:

According to Donnelly, as his research progressed throughout the mid-late 1980s, it became increasingly apparent to him that major multinational corporations were destined to exercise a greater and greater influence over the world of sports – chiefly through sponsorships and advertisement strategies. As he and several other scholars pointed out, in a collective effort that ended up being instrumental for the consolidation of a critical sociology of sport in Canada (e.g., CANTELON; GRUNEAU, 1982), this expanding commercialization of the sporting field was driven by a subset of values that stood in sharp contrast to the more conventional values previously associated with the practice of sports (most notably in educational contexts). Yet, as Donnelly correctly identified, in a pioneer fashion, the rise of commodified sports was not only antagonized and slowed down by tradition; new paths of resistance emerged as sporting practices started to be gradually transformed and reinvented, producing an ongoing tension between hegemonic and alternative forms of physical engagement (DONNELLY; YOUNG, 1985; DONNELLY, 1988a, 1988b). The study of these counter-hegemonic sporting (sub)cultures represents, in effect, a unifying concern in Donnelly’s long scholarly career.

The notion of hegemony featured in Donnelly’s scholarship borrows heavily from the Gramscian formulation of the concept, which places significant emphasis on the role of cultural institutions in the reproduction of the status quo in capitalist societies. The field of sports is conceived, in this connection, as a sphere of cultural life that plays a meaningful part in the perpetuation of the established social order. The engagement with the legacy of Antonio Gramsci was, according to Ingham and Donnelly (1998), one of the driving forces behind what these authors identified as a “critical turn” in the sociology of sport in North America, starting in the late 1970s. An interesting coincidence in Donnelly’s take on hegemony derives from the fact that he was attending a teacher’s training college near, and affiliated with the University of Birmingham in 1964, when Richard Hoggart and Stuart Hall first established the Centre for Contemporary Cultural Studies. However, he points out that he only became aware of the CCCS some 10 years later, following a prolific period for the Centre, when he was a graduate student in the United States. The reassessment of Gramsci’s notion of hegemony was central to the emergence of the interdisciplinary field of research that came to be known as (British) Cultural Studies, especially through the work of Raymond Williams (1977). The influence of these sources is evident in Donnelly’s scholarship, including when he speaks about counter-hegemony, conceived as divergent practices that destabilize established social and cultural hierarchies.

Donnelly saw promise in counter-hegemonic sporting cultures, of course. But he was also interested in comprehending how mainstream sporting cultures would evolve, down the road of enhanced commercialization. In this specific connection, one might ask: how did Donnelly envision the most acute consequences of the colonization of the sporting world by market dynamics?

He began to suspect, at the time, that the partnerships between multinational corporations and elite athletes, especially in popular sports such as soccer, were becoming so strong and prevalent that major companies would eventually find themselves in the position to compete against nation states for the attention of viewers and fans. In this projected scenario, large corporations would join forces to fund and create some model of supra-national league, in which companies would assemble their own respective teams with the star players that they sponsor through individual contracts – who would then perform for a given label rather than for a national team. This would result, so to speak, in a soccer world cup of brands, which would convene from time to time.

Donnelly's take, as he further explained, was in part based on William Harrison's (1974) short story, *Roller ball murder*, which chronicles the life of Jonathan E – an international star in an ultraviolet (yet immensely popular) sport, administered by major conglomerates in a fictional future.

This rather dystopic interpretation of the long-term effects of commercialization in the sport of soccer obviously did not materialize. "I got this one completely wrong", Donnelly expressly told me on the occasion alluded to above. And he subsequently added something to this effect: "I was simply unable to predict the resurgence of nationalism in the 1990s" – a trend that has indeed been well-documented in the literature of the social sciences (e.g., SMITH, 1996).

2 METHODOLOGY: A DIFFERENT POINT OF VIEW

During my doctoral research, I studied the development of the ice hockey manufacturing industry in Canada, seeking to pay particular attention to what I like to refer to as the relationship between the 'field of play' and the 'field of production' in the historical development of the game (NOTHEN; KIDD, 2022). It was perhaps this propensity to look at sports from the standpoint of their material basis – which I constantly sought to train and develop over the years – that led me to reflect upon and (re)consider Donnelly's forecast from a different angle: that is, by focusing on the landscapes of production in the soccer manufacturing industry and its remarkable concentration in the hands of a few multinational companies.

In this paper, I argue that Donnelly's take on the potential outcomes of enhanced commercialization in soccer (and sports in general), contrary to his belief, was not entirely wrong. Rather, it accurately anticipated a struggle for market dominance that would indeed be played out in the soccer field – even if not by the means that he imagined, but by proxy.

To illuminate this competitive dynamic in greater detail, I researched and compiled information concerning the official kit provider of numerous soccer clubs

and national teams, totaling 253 cases. This investigation covers the clubs affiliated to the elite division of ten professional soccer leagues, based in the following countries: Brazil (20); Canada (3); Colombia (19); England (20); France (19); Germany (18); Italy (20); Mexico (18); Monaco (1); Portugal (18); Spain (20); and the United States (25). It also considers the top-50 national teams according to the rankings organized by the International Federation of Association Football (FIFA) in the context of men's soccer, as well as a few additional cases (2) that were deemed relevant due to the large population of the countries concerned.

Most of the evidence presented in this study takes into account the 2020/2021 season, but there are also a few tables that illustrate the question from an historical standpoint. Another exception is the data regarding the Portuguese league, which comes from the early part of the 2021/2022 season. The search was carried out on websites for companies that sell authentic sports merchandise; official websites of national soccer federations and clubs; and, in some cases, the information was double-checked through images published in the press.

The ensuing exposition contains three major sections. In the *first*, I present and analyze the findings related to national soccer teams. In the *second*, the focus rests on five European national soccer leagues and, by extension, on the clubs associated with them. The *third* part is centered on four national soccer leagues in the Americas. The essay then concludes with a few considerations on the financial and geographical concentration of the soccer manufacturing industry on a global scale, while also indicating the further developments expected for this research.

There may be a few cases of soccer clubs or national teams that changed their equipment providers over the course of this research. The numbers presented here are also prone to vary on a yearly basis, due to the relegation system adopted by most of these leagues. However, these are minor shifts, in my estimation, that do not significantly affect the points articulated in this inquiry.

3 RESEARCH PERSPECTIVES ON THE SOCCER MANUFACTURING INDUSTRY

The political economy of contemporary soccer constitutes a broad field of research, in which complex social, cultural, and economic issues are enmeshed (GIULIANOTTI, 1999). In the context of the present inquiry, the term 'soccer manufacturing industry' alludes to a constituent part of this larger field – namely, the industrial branch responsible for the manufacture of the equipment needed to play the sport, as well as its commercial ramifications.

Despite its massive economic significance in the world of sports, studies focusing primarily on the soccer manufacturing industry are relatively scarce. From an historical perspective, research often concentrates on the evolution of soccer gear. David Winner (2013), for instance, discusses how the introduction of lighter materials in the making of soccer balls and boots has produced significant changes in the flow of the game. Another interesting example is the work of Gabe Logan (2019), in which some of the rationales behind the adoption of specific colors and styles for soccer

uniforms are presented, as the sport developed in the city of Chicago in the early twentieth century. There is, moreover, an emerging domain of sports historiography that deals with the significance of sporting artifacts as cultural objects, especially through the engagement in museum ethnography. Inquiries produced in this vein often include considerations about the context in which sporting commodities were manufactured. As it relates to soccer, in particular, the article by John Hughson and Kevin Moore (2012) concerning the material properties of the jersey used by Diego Maradona in the semifinal of the 1986 FIFA World Cup is particularly illustrative.

In the field of sport management, surveys have explored issues such as the particularities of the bidding process for kit sponsorships *versus* jersey sponsorships (DOELLMAN *et al.*, 2022); the industrial sectors that were more heavily involved in the sponsorship of jerseys in the English Premier League, since 1992 (BEEK; DEROM, 2022); as well as how shareholders view sponsorship deals in the sports apparel industry and their perceived effects on the valuation of publicly traded companies (BOUCHET *et al.*, 2017).

When it comes to the sociology of sport, a vibrant branch of critical scholarship has formed over the past few decades centered upon the poor laboring conditions that underpin the soccer manufacturing industry, especially in the Global South. “Industries such as apparel and footwear”, Wolfram Manzenreiter (2013) points out, “are characterised by low fixed costs and labour-intensive manufacturing and typically serve as springboard for economic development in countries that are engaged in export-oriented industrialisation” (p. 1301). Farah Naz and Deiter Bögenhold (2020), for example, conducted in-depth interviews and focus groups with workers involved in the production of soccer equipment in Pakistan. This study provides evidence of the “highly exploitative work conditions” that shape this industrial realm. It documents, in addition, the gendered relations that characterize the dynamics of the factory floor in similar settings, in which female workers occupy the “lowest end in the hierarchy of production” (p. 14). Especially in the 1990s and early 2000s, child labour was another recurrent issue in the production of soccer balls in countries such as India and Pakistan (GOYAL, 2004; BOJE; KHAN, 2012). Whereas, more recently, greater corporate responsibility on the part of multinational companies has been able to significantly mitigate the problem, other economic difficulties emerged for these communities – for instance, increased competition from China, which ventured into the production of “lower-quality balls that usually had been stitched by women” (KHAN; MUNIR; WILLMOTT, 2007, p. 1069). Peter Donnelly, incidentally, was one of the early contributors to the study of child labour in the context of sports (DONNELLY, 1997; DONNELLY; PETHERICK, 2004). However, even though his articles contain references to child labour in the soccer manufacturing industry, their chief concern was with the occurrence of child labour in athletic settings. It is interesting to note that most inquiries dealing with the working conditions experienced in the soccer manufacturing industry – as well as in the sports manufacturing industry more broadly – were published in ‘mainstream’ sociology journals, signaling that these constitute topics whose significance extrapolates the realm of sport studies.

A variety of products are made under the rubric of soccer equipment. This paper focuses, in particular, on identifying the companies responsible for the manufacture of the official jerseys and kits for a number of soccer clubs and national teams, as indicated in the previous section. The data presented here, therefore, accounts for a limited part of what is a much larger industrial branch. A wider understanding of this industry would have to consider, as well, the companies engaged in the manufacture of other pieces of equipment, such as, for example, soccer boots, balls, or socks, not to mention the production of counterfeited items – a matter engagingly discussed by John Sugden in his seminal book about the sport, *Scum airways: inside football's underground economy* (2002).

4 RESULTS AND DISCUSSION: NATIONAL TEAMS

By looking at the world of professional soccer in its contemporary form, it is difficult to imagine that, by the early 1980s, the practice of displaying the logo of equipment providers on the chest area of the jerseys was still very incipient. Major European soccer clubs started to partner with equipment companies around the 1960s. Yet, it was a while before the emblems of corporations became fully integrated into the prime advertising area of the uniforms. Within this time frame (1960s-1980s), the landscapes of production in the soccer manufacturing industry were rather diversified and included several brands that no longer play a substantial part in this industrial sector. A company called Mecsport, for example, provided jerseys for Inter Milan during the first half of the 1980s, while the kits of FC Barcelona were produced by Meyba until the early 1990s.

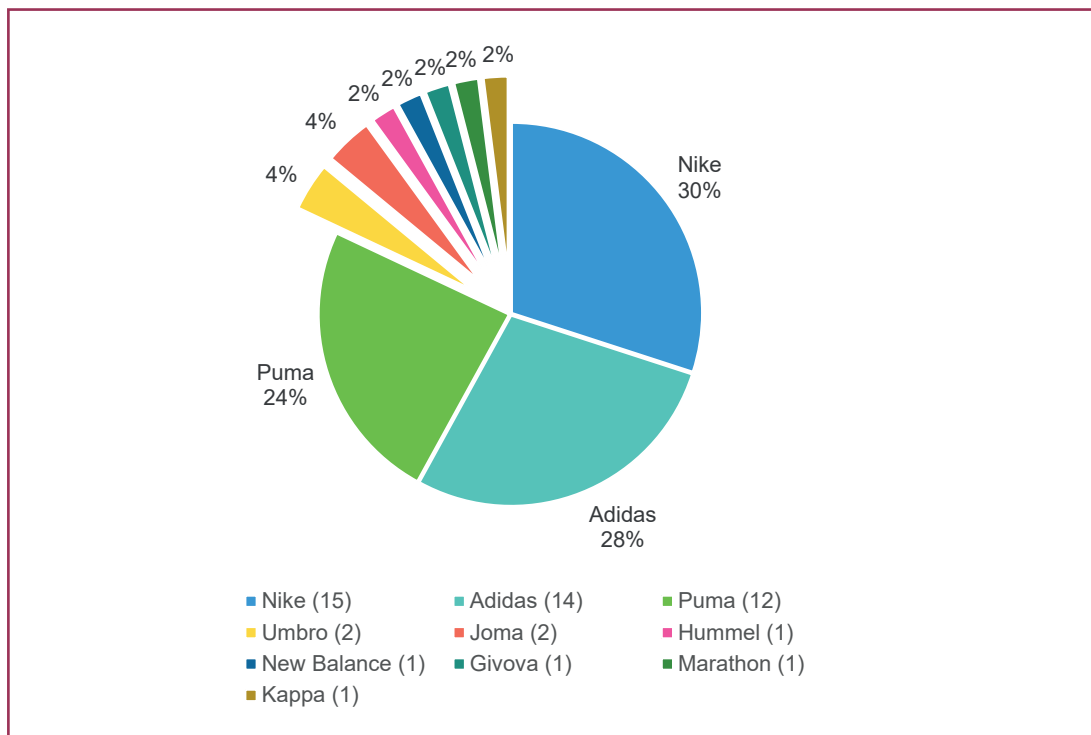
The situation was not significantly different when it came to national soccer teams. In 1978, Argentina became the first squad to win the FIFA men's world championship while featuring an equipment trademark in the chest area of its jersey (Adidas). The logo in question was rather discreet, when compared to the ones in fashion today. This appears to be, indeed, a general trend in this industrial sector: as time progressed, the size of the logos gradually increased, until reaching their current dimensions.

Four years later, by contrast, Italy won the same tournament wearing a kit with no apparent logo, illustrating how underdeveloped this marketing strategy still was, at the time that Peter Donnelly started to contemplate the advance of commercialization in the sport of soccer. The practice, however, returned in 1986, again with Argentina – this time for good. All the national teams that were to become world champions from this point onwards had the logo of a manufacturing company stamped in their jerseys. In the period between 1986 and 2018, which covers nine editions of the Cup, five brands were seen at the top of the podium: Adidas (1990, 1998, 2010, 2014); Nike (2002, 2018); Puma (2006); Umbro (1994); and Le Coq Sportif (1986).

The 1990s and the early 2000s witnessed a substantial strengthening in the relationship between national soccer federations, soccer clubs, and the producers of soccer equipment – particularly in terms of the length and the value of the contracts. This process was backed by an expansion in the commercialization of broadcasting

rights (mostly television) and the wider brand exposure associated with it (Milne, 2016). The soccer manufacturing industry, in addition, progressively shrunk in diversity during this period, notably at the elite levels of the sport, becoming heavily concentrated in the hands of a few multinational companies – in a process that certainly stretches to the present day. Chart 1 shows the breakdown per equipment provider for the top-50 ranked national soccer teams, considering the rankings published by FIFA in August 2021.

Chart 1 – Breakdown per equipment provider for the top-50 ranked national teams in men’s soccer.



Source: compiled by the author.

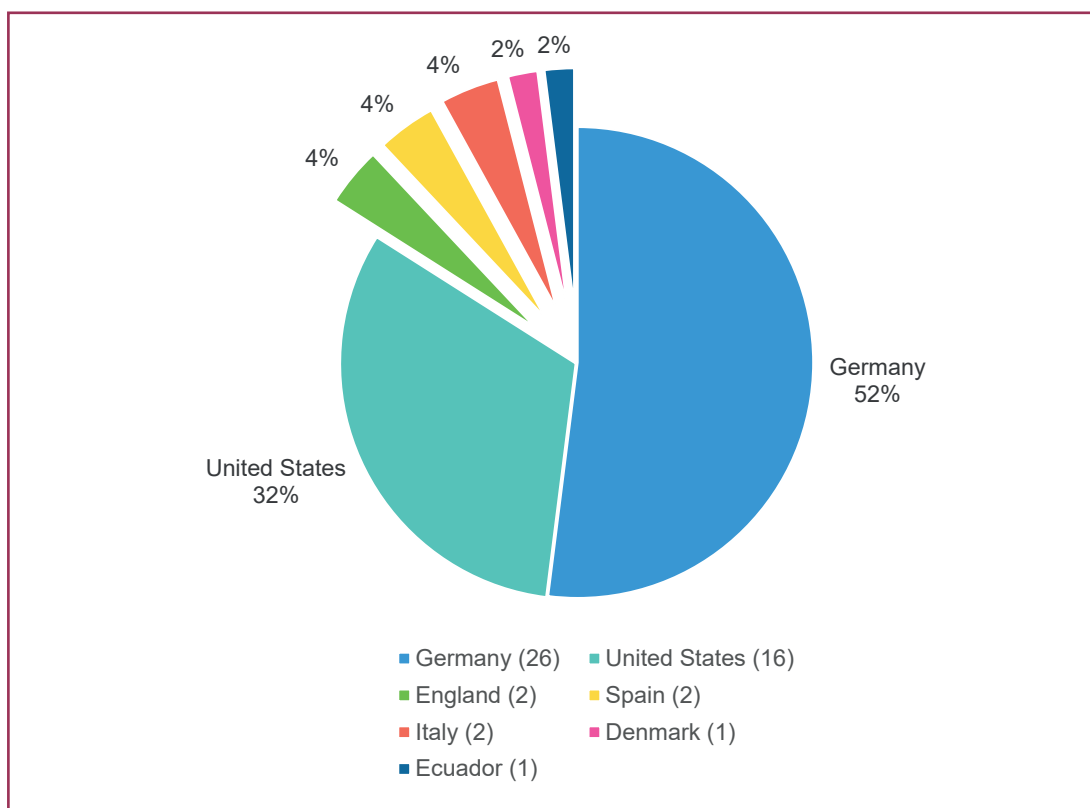
The strong predominance of a few multinational companies over the soccer manufacturing industry is hardly surprising – most people would certainly come to expect similar results, almost tacitly, having grown so used to their constant presence in nearly all soccer-related matters. Combined, Adidas (15), Nike (15) and Puma (11) hold what amounts to 82% of the equipment sponsorship deals for the top-50 ranked national soccer teams. In the top-20, a single exception exists – the Danish squad.

If one adds to these numbers the estimates of the total population of each of the fifty countries in question, the percentage of the market held by these three companies climbs to 93%. Ukraine (Joma) is the only exception insofar as nations with over 40 million inhabitants are concerned. When it comes to the most populated countries in the world, contrasting dynamics emerge: the Chinese national soccer team is sponsored by Nike, whereas the uniforms for the Indian side are made by a local company, Six5Six.

Perhaps the most intriguing information embedded in the data presented above, however, concerns the breakdown based on where the headquarters of the companies are located, as indicated on Chart 2. In a universe of fifty countries, forty-

three have deals with corporations situated in Germany and the United States. This means that companies from these two countries control, alone, 86% of the contracts in the scenario presented.

Chart 2 – Breakdown per country where the headquarters of the companies are located.



Source: compiled by the author.

Further exploring the data, it is possible to identify, in addition, that nineteen of the countries taken into account for the composition of Chart 1 belong to what has been conventionally referred to as the Global South. This represents 38% of the total number of national teams under consideration. Yet, equipment companies from the Global South only hold a single contract: with the soccer federation of Ecuador. In total, the logos featured on the jerseys of 49 of the top-50 ranked national soccer teams are from companies based in the Global North – that is, 98%. The Eastern portion of Europe is another underrepresented region, with many representatives on the list, but no equipment company contracts.

Of course, the fact that the production of most of the soccer equipment consumed in the world is carried out in the Global South only adds another layer of complexity to the matter, revealing a sharp concentration of capital and labour in different nodes of the soccer manufacturing industry. This polarized scenario is in large part the outcome of the implementation of offshoring and outsourcing strategies that intensified in the 1990s (HARVEY; RAIL; THIBAUT, 1998).

On the topic of aggressive capitalization strategies, moreover, it may be worth noting the remarkable business acumen exercised by the corporate executives and, most distinctively, by the representatives of soccer federations that managed to come up with the idea of making kit sponsorships such a common feature of the sport at the

level of the competition among nation states. Further research would be necessary to shed more information on the specific individuals, entities and corporations that pioneered this approach, as well as the reasons why it faced so little resistance on the part of the governing bodies of soccer. Today, nonetheless, one thing is for certain: while advertisements on the belly or sleeve areas of the jerseys are still typically conceived as unacceptable when it comes to national soccer teams, albeit quite prevalent in the context of soccer clubs, companies that produce sporting goods have successfully normalized the practice of displaying their logos on the uniforms of national squads. A truly impressive commercial feat, in a terrain shaped by nuanced cultural and regional sensibilities.

All things considered, however, the ultimate paradox in the context of the commercialization of soccer as it relates to nation states, in my view, concerns a business decision that is predicated on the will of the representatives of national soccer federations alone. These federations function as private entities, whose existence must feed from latent feelings of national pride in any given nation. Their own institutional perpetuation and growth thus depends on the nourishment of similar sentiments. But it also does so on monetary gains, and this appears to be why, as further refinement of the data presented in the charts above shows, 47 out of the top-50 ranked national teams in the list provided by FIFA have their jerseys sponsored by foreign companies (Germany, Denmark, and the United States are the few exceptions). National soccer federations, in essence, encourage fans to exercise national loyalties, while at the same time refraining from doing so when it comes to the decision of picking the equipment to be used by the teams that they represent. Money, as Karl Marx stated in the *Economic and philosophic manuscripts of 1844* (1961), “is the fraternisation of impossibilities. It makes contradictions embrace” (p. 141).

5 RESULTS AND DISCUSSION: SOCCER CLUBS IN EUROPE

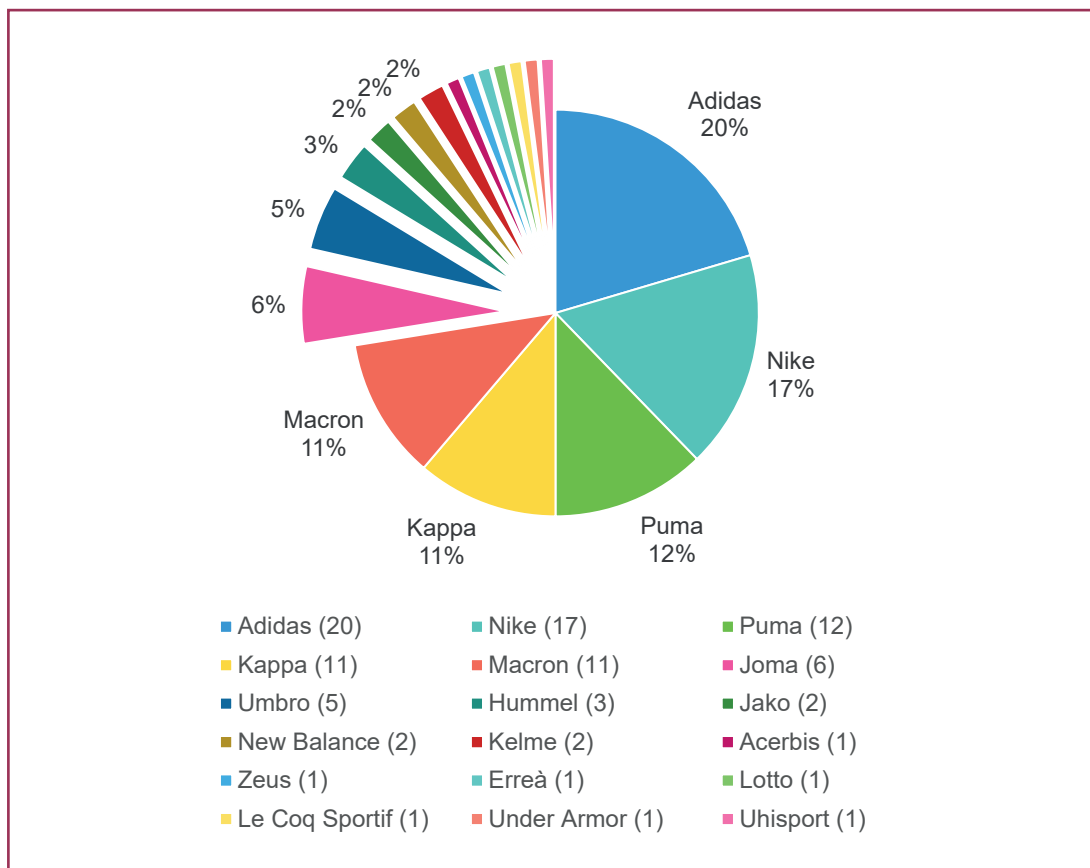
National teams certainly play an important role in the world of professional soccer. Soccer clubs, however, are by far more numerous and regionally spread – and this wider diversity is also reflected in the industrial sector that undertakes the manufacture of soccer kits. This topic is explored more thoroughly in this section.

Europe is unequivocally the financial center of global soccer, especially at the club level. Five national leagues, typically referred to as the ‘Big Five’, concentrate the largest share of this wealth: the Bundesliga (the German national soccer league); the Premier League (the English national soccer league); La Liga (the Spanish national soccer league); the Serie A (the Italian national soccer league); and, most notably in recent years, the Ligue 1 (the French national soccer league, which includes Monaco).

In total, 98 clubs take part in these national championships every season – the Bundesliga is the exception with only 18 teams, whereas the other four leagues feature 20 clubs each. In the year of 2021, three multinational corporations – Adidas (20), Nike (17), and Puma (12) – acted as the official equipment supplier to 49 of these clubs, which amounts precisely to 50% of them. If the companies Macron (11) and Kappa (11) are added to this list, the percentage climbs to 72%, meaning that five

brands control nearly three-quarters of the equipment supplier deals available in the ‘Big Five’ European soccer leagues (Chart 3).

Chart 3 – Breakdown per equipment provider for clubs in the ‘Big Five’ European soccer leagues.



Source: compiled by the author.

These numbers alone show a significantly concentrated market, with a handful of multinational companies in charge of most of the existing contracts, despite the deep-seated regional allegiances that characterize many of the geographical areas concerned. However, this concentration becomes even more pronounced if one takes into account, as well, the uneven popular appeal mobilized by the different clubs considered in this research.

The database *Statista*, which compiles consumer data on various sectors of the market, for example, lists the top ten selling football jerseys in 2018/2019, by club. In this list, Adidas (4), Nike (4), and Puma (2) hold every single one of the contracts. Another interesting example is the proposed European ‘Super League’ – which, albeit failing to materialize, shook the governance of European soccer to the core, early in 2021. Amongst its 12 founding clubs, six have equipment supply deals with Nike; four with Adidas; and two with Puma. In essence, this indicates that the market lead enjoyed by these three companies is further augmented when the breakdown by club is supplemented with the sales associated with each of them.

This threefold concentration of the soccer equipment market at the level of the most popular European clubs is quite remarkable, indeed. And what is perhaps most intriguing about this scenario is that the competition between multinational

companies, in many senses, feeds from long-established rivalries between traditional soccer clubs, within each country. In Italy, for example, Inter Milan is sponsored by Nike; AC Milan by Puma; and Juventus by Adidas. In Spain, Real Madrid is sponsored by Adidas; FC Barcelona and Atletico de Madrid by Nike; and Valencia by Puma. In Germany, Bayern Munich is sponsored by Adidas, whereas Borussia Dortmund is sponsored by Puma. In France, Paris St. Germain is sponsored by Nike; Lyon by Adidas; and Olympique de Marseille by Puma.

Finally, in England, Liverpool, Tottenham, and Chelsea are sponsored by Nike; Arsenal and Manchester United by Adidas; and Manchester City by Puma. A similar tendency was identified, using data from a decade ago, in a study conducted by Unlucan (2014).

The table below (Table 1) shows who the top-3 finishers would be in the ‘Big Five’ European soccer leagues in the year of 2021, if the names of the clubs were replaced by the names of their respective equipment suppliers:

Table 1 – Equipment providers for the top-3 finishers in the ‘Big Five’ European soccer leagues: 2020/2021 season.

	Premier League	Bundesliga	La Liga	Serie A	Ligue 1
1°	Puma	Adidas	Nike	Nike	New Balance
2°	Adidas	Nike	Adidas	Puma	Nike
3°	Nike	Puma	Nike	Joma	Kappa

Source: compiled by the author.

To be sure, this is not an exception, but a recurrent pattern, with a few changes in the companies that alternate at the top of the list every year. The last time that a club wearing a non-German or American sponsored uniform won a ‘Big Five’ league was in the 2010/2011 season, when Lille (Umbro) clinched Ligue 1.

To conclude this topic, I would like to briefly discuss the case of Portugal, as an example of a Western European soccer league that is somewhat detached from the financial core of the sport. In Portugal (Primeira Liga), the three most popular soccer clubs are sponsored by American or German companies, in tandem with what happens in the ‘Big Five’ – Sporting (Nike), Porto (New Balance), and Benfica (Adidas). But there is significantly more diversity when it comes to the rest of the league, without a single company holding more than two contracts, in a universe of 18 teams. This appears to suggest that the grip of multinational companies over the soccer manufacturing industry loosens slightly as one moves away from the financial center of the sport, as might be expected. In the following section, data concerning several leagues in the Americas is presented, as a point of comparison.

6 RESULTS AND DISCUSSION: SOCCER CLUBS IN THE AMERICAS

The Americas are marked by sharp contrasts between the North and the South, and this is equally true when it comes to the question of soccer kit sponsorship in prominent leagues. In these two regions, it is possible to identify widely different

tendencies that may help to shape the future of the soccer manufacturing industry on a global scale.

Major League Soccer (MLS), which brings together affiliated clubs from the United States and Canada, represents a clear-cut case of monopolization. In the past, other major soccer leagues have negotiated collective deals, for example when it comes to broadcasting rights, in different parts of the world. But the production of soccer kits has traditionally been fragmented at least amongst a few companies. The MLS illustrates what the dominance of a single brand of equipment over the kit sponsorship landscape of two countries looks like, insofar as the highest levels of professional soccer are concerned, with all the 28 teams affiliated to the league wearing jerseys produced by the same company – ironically, Adidas, from Germany. Of course, such monopolization of the market was made possible by the ownership structure of the MLS, which to a significant degree mirrors the format adopted by other major American sports leagues, such as the National Football League (NFL) and the National Basketball Association (NBA). In these leagues, such decisions are centralized by a governing body, and affiliated franchises are not permitted to negotiate individual deals when it comes to equipment sponsorship rights. One wonders if this same model might not be eventually adopted in other parts of the world, now that major soccer leagues are increasingly invested in capitalizing on naming rights, which is a strategy that clearly links the name of the league to a specific brand.

Shifting the focus to Central and South America, a very different scenario emerges when considering the equipment provider per soccer club, in the context of the three following leagues: Liga MX (the Mexican league); Categoría Primera A (the Colombian league); and the Campeonato Brasileiro (the Brazilian league).

In this context, a robust presence of multinational corporations is also evidenced, especially in large markets, such as Mexico City; Bogotá; São Paulo; and Rio de Janeiro. Only four companies sponsor at least one team in each of the leagues mentioned above: Umbro; Nike; Puma; and Adidas. The total figures, however, are far more diffuse and evenly distributed in comparison to Europe, when it comes to the number of contracts held by each brand, as shown in the chart below (Chart 4).

However, over the past few years a quite remarkable counter-hegemonic trend started to take shape: some soccer clubs have begun to commission the production of their own jerseys. Most of the brands created in this connection embed references to the history of the entities concerned. In the analysis conducted, four teams fit in this category, having their kits produced under the following trademarks: 19Treze (Juventude); Leão 1918 (Fortaleza); Vozão (Ceará); and Esquadrão (Bahia). According to media reports, several Brazilian clubs have registered an increase in the revenues associated with the sale of jerseys and other merchandise since this practice was implemented (RODRIGUES; COSENZO, 2018). In most cases, fans are even allowed to participate in online surveys to choose which models will be manufactured next (MOTA, 2021).

Overall, the number of teams that adhered to this trend is certainly eye-catching, and particularly meaningful in the Brazilian context, where most clubs are not privately owned. Yet, it is difficult to predict whether this tendency will endure. A few major Brazilian soccer clubs have allegedly shown interest in adopting the strategy; but were hesitant to do so due to logistical difficulties expected in its implementation. In any case, the possibility that, in the future, soccer clubs could play a more preeminent role in the production and in the commercialization of the equipment that they use seems to be in the true spirit of Peter Donnelly. Brazil has revolutionized the game of soccer a few times on the 'field of play'. Perhaps the time has arrived for it to do so in the 'field of production'.

7 CONCLUSION

A complex social phenomenon such as soccer cannot be adequately understood when considered from a unilateral perspective. However, it may be quite illuminating to do so for analytical purposes. When one of the processes that underpin a larger phenomenon is considered in isolation, the dynamics specific to it can be appreciated with greater clarity and depth. This type of exercise is useful not only in terms of shedding greater light on the particularities of a given process; it can also lead to new interpretations about the ways in which different underlying factors are entangled.

In this research, the world of professional soccer was analyzed from the standpoint of its material production. The inquiry focused, in particular, on mapping the companies that hold the rights to manufacture and commercialize soccer jerseys for clubs affiliated to a number of different national soccer leagues, as well as national teams. While the sample utilized in this study represents only a portion of a much wider field, it is a very substantial one, indeed, given the great financial and symbolic weight carried by many of the entities considered.

Soccer is often referred to as a 'global' game. But this appears to be scarcely the case when it comes to the soccer manufacturing industry. In several respects, this industry is certainly not global – it is, rather, heavily localized in Germany and in the United States, in terms of profits, and in Asia, in terms of production. The notion of a "glocal" dynamic, sometimes used in connection with the economic and cultural

landscapes of soccer (e.g., GIULIANOTTI; ROBERTSON, 2004), is perhaps the idea that fits best here: the soccer manufacturing industry acts globally when it comes to generating greater revenues; but largely locally insofar as the accumulation of capital is concerned.

If one looks at the most prestigious soccer tournaments in the world, seeking to abstract for a moment from the actual national teams or clubs involved, and concentrating solely on the logo of the equipment provider displayed on the chest of the players, what is there to be seen? Through this conceptual exercise, it is possible to witness the importance of regional/national affiliations and rivalries in professional soccer suddenly fading, and all that is left behind is a competition between the very same handful of multinational companies that thoroughly dominate the soccer equipment market. Precisely as Peter Donnelly envisioned several decades ago – or maybe even worse, given the very limited number of companies that are in effect able to play a meaningful part in the game.

The interesting aspect that Donnelly missed, however, is how local and regional rivalries would not loosen in a more globalized era; but become central elements in the monetization of the practice of serving as the equipment provider for soccer clubs and national teams. In the scenario forecasted by Donnelly, it is, broadly speaking, difficult to presume that fans would nurture strong emotional connections to specific multinationals. The actual way in which the issue developed is far more disingenuous. What large soccer equipment companies accomplished, in practical terms, was to significantly incorporate the passion associated to rivalries and regional alliances into a monopolizing market dynamic, in a mutually beneficial fashion, that reinforces the lead of the companies at the top. Everywhere across Western Europe and the Americas, as the data provided in this study suggests, soccer rivalries and regional allegiances play a part in enhancing revenues for the same few corporations, mobilizing clubs and national teams as proxies.

This way of looking at the world of professional soccer cannot be simply dismissed as an abstraction. It is, in reality, a very legitimate perspective, which helps to guide the various business decisions of, for example, the executives of major soccer equipment companies – some of the most powerful stakeholders in the sport. The relative simplicity of the argument developed in this paper, moreover, overshadows some of the complexities embedded in the formation of monopolies to the degree evidenced in the soccer manufacturing industry. While better knowledge of these historical processes certainly warrants further research, these are contingencies that, in my understanding, would not significantly affect the cogency of the points advanced here.

Another marked consequence produced by monopolizing tendencies in the soccer manufacturing industry is the progressive homogenization of the products available in the market. As a few companies solidify their grip on a global scale, soccer uniforms used in very different parts of the world appear to look increasingly alike, minimizing diversification. This process can be interpreted as part of the general move towards enhanced quantification identified by Guy Debord (1983) as one of the

fundamental aspects of the society of the spectacle, characterized by the primacy of “exchangeable homogenous units and the suppression of the qualitative” (p. 82).

The data presented in this study is a portion of a broader research project that, if adequately funded, seeks to perform a similar analysis considering the soccer manufacturing industry on a global scale. The heavy focus on Western Europe and the Americas is certainly one of the limitations of the research conducted thus far, since it would be important to comprehend, in greater detail, how the soccer equipment market is divided as one moves further away from the financial epicenter of the sport. Other meaningful limitations of this inquiry are the lack of information about women’s soccer, as well as about the amateur levels of the sport.

A final note: Peter Donnelly recently retired from his position at the University of Toronto but, as an Emeritus Professor, he is continuing to work in the sociology of sport. This paper is intended as a small celebration of his mentoring, teaching, and research legacies in the sociology of sport. Above everything else, it seeks to stress the ingenuity and creative thinking that have marked his contributions to the field, as well as his relentless pursuit of looking at the sporting world from *a different point of view*.

REFERENCES

- BEEK, Remco; DEROM, Inge. Sponsorship eras in the English Premier League: changing industries and globalization between 1992 and 2021. **Soccer & Society**, v. 23, n. 4-5, p. 349-366, 2022. DOI: <https://doi.org/10.1080/14660970.2022.2059873>
- BOJE, David; KHAN, Farzad. Story-Branding by empire entrepreneurs: Nike, Child Labour, and Pakistan’s Soccer Ball Industry. **Journal of Small Business & Entrepreneurship**, v. 22, n. 1, p. 9-24, 2012. DOI: <https://doi.org/10.1080/08276331.2009.10593439>
- BOUCHET, Adrien; DOELLMAN, Thomas; TROILO, Mike; WALKUP, Brian. Pre-empting the competition: how do shareholders view sponsorships in the sport apparel industry? **Journal of Sport Management**, v. 31, n. 3, p. 275-287, 2017. DOI: <https://doi.org/10.1123/jsm.2016-0151>
- CANTELON, Hart; GRUNEAU Richard. **Sport, culture, and the modern state**. Toronto: University of Toronto Press, 1982.
- COLLINS, Randall. Prediction in macrosociology: the case of the Soviet collapse. **The American Journal of Sociology**, v. 100, n. 6, p. 1552-1593, 1995. DOI: <https://doi.org/10.1086/230672>
- DEBORD, Guy. **Society of the spectacle**. Detroit: Black & Red, 1983.
- DOELLMAN, Thomas; WALKUP, Brian; BOUCHET, Adrien; CHABOWSKI, Brian. A dichotomy of sport sponsorships: does the nature of competition among sponsors matter? **Journal of Sport Management**, v. 36, n. 2, p. 188-198, 2022. DOI: <https://doi.org/10.1123/jsm.2020-0203>
- DONNELLY, Peter. Child labour, sport labour: applying child labor laws to sport. **International Review for the Sociology of Sport**, v. 32, n. 4, p. 389-406, 1997. DOI: <https://doi.org/10.1177/101269097032004004>

- DONNELLY, Peter. Sport as a site for “popular” resistance. *In*: GRUNEAU, Richard (ed.). **Popular cultures and political practices**. Toronto: Garamond Press, 1988a. p. 69-82.
- DONNELLY, Peter. Subcultures in sport: resilience and transformation. *In*: INGHAM, Alan; LOY, John (ed.). **Sport and social development: traditions, transitions, and transformation**. Champaign, IL: Human Kinetics, 1988b. p. 119-146.
- DONNELLY, Peter; PETHERICK, Leanne. Workers’ playtime? Child labour at the extremes of the sporting spectrum. **Sport in Society**, v. 7, n. 3, p. 301-321, 2004. DOI: <https://doi.org/10.1080/1743043042000291659>
- DONNELLY, Peter; YOUNG, Kevin. Reproduction and transformation of cultural forms in sport: A contextual analysis of rugby. **International Review for the Sociology of Sport**, v. 20, n. 1-2, p. 19-38, 1985. DOI: <https://doi.org/10.1177/101269028502000103>
- GIULIANOTTI, Richard. **Football: a sociology of the global game**. Cambridge: Polity Press, 1999.
- GIULIANOTTI, Richard; ROBERTSON, Roland. The globalization of football: a study in the glocalization of the ‘serious life’. **The British Journal of Sociology**, v. 55, n. 4, p. 545-568, 2004. DOI: <https://doi.org/10.1111/j.1468-4446.2004.00037.x>
- GOYAL, Pratibha. Child labour in the sports goods industry – findings from a survey in selected bastis of Jalandhar. **Social Change**, v. 34, n. 1, p. 66-74, 2004. DOI: <https://doi.org/10.1177/004908570403400107>
- HARRISON, William. **Roller ball murder**. New York: William Morrow, 1974.
- HARVEY, Jean; RAIL, Geneviève; THIBAUT, Lucie. Globalization and sport: sketching a theoretical model for empirical analyses. **Journal of Sport and Social Issues**, v. 20, n. 3, p. 258-277, 1998. DOI: <https://doi.org/10.1177/019372396020003003>
- HUGHSON, John; MOORE, Kevin. ‘Hand of God’, shirt of the man: the materiality of Diego Maradona. **Costume**, v. 46, n. 2, p. 212-225, 2012. DOI: <http://dx.doi.org/10.1179/0590887612Z.00000000010>
- INGHAM, Alan; DONNELLY, Peter. A sociology of North American sociology of sport: Disunity in unity, 1965 to 1996. *Sociology of Sport Journal*, v. 14, n. 4, p. 362-418. DOI: <https://doi.org/10.1123/ssj.14.4.362>
- KHAN, Farzad; MUNIR, Kamal; WILLMOTT, Hugh. A dark side of institutional entrepreneurship: soccer balls, child labour and postcolonial impoverishment. **Organization Studies**, v. 28, n. 7, p. 1055-1077, 2007. DOI: <https://doi.org/10.1177/0170840607078114>
- LOGAN, Gabe. **The early years of Chicago soccer, 1887-1939**. Lanham: Lexington Books, 2019.
- MANZENREITER, Wolfram. Global sports commodity chains and Asia’s new interregional division of labour. **The International Journal of the History of Sport**, v. 30, n. 11, p. 1299-1314, 2013. doi: <http://dx.doi.org/10.1080/09523367.2013.793178>
- MARX, Karl. **Economic and philosophic manuscripts of 1844**. Moscow: Foreign Languages Publishing House, 1961.
- MILNE, Mike. **The transformation of television sports: new methods, new rules**. New York: Palgrave Macmillan, 2016.

MOTA, Alexandre. Fortaleza e Ceará têm arrecadação milionária com mercado de camisas; saiba como funciona produção. **Diário do Nordeste** [online]. 28 Mar 2021. Retrieved from: <https://diariodonordeste.verdesmares.com.br/jogada/fortaleza-e-ceara-tem-arrecadacao-milionaria-com-mercado-de-camisas-saiba-como-funciona-producao-1.3065746> Accessed on: Nov. 4, 2022.

NAZ, Farah; BÖGENHOLD, Deiter. Understanding labour processes in global production networks: a case study of the football industry in Pakistan. **Globalizations**, v. 17, n. 6, p. 917-934, 2020. DOI: <https://doi.org/10.1080/14747731.2019.1708658>

NOTHEN, Guilherme; KIDD, Bruce. Estranged: notes on the historical development of the relationship between players and manufacturers of ice hockey equipment in Canada. **The International Journal of the History of Sport**, v. 39, n. 1, p. 72-91, 2022. DOI: <https://doi.org/10.1080/09523367.2022.2037568>

RODRIGUES, Bruno; COSENZO, Luiz. Clubes dispensam grandes marcas e lucram com fabricação própria de camisa. **Folha de São Paulo** [online], 2018. Retrieved from: <https://www1.folha.uol.com.br/esporte/2018/10/clubes-dispensam-grandes-marcas-e-lucram-com-fabricacao-propria-de-camisa.shtml>. Accessed on: Nov 4, 2022.

SMITH, Anthony. LSE Centennial Lecture: the resurgence of nationalism? Myth and memory in the renewal of nations. **The British Journal of Sociology**, v. 47, n. 4, p. 575-598, 1996. DOI: <https://doi.org/10.2307/591074>

SUGDEN, John. **Scum airways**: inside football's underground economy. Edinburgh: Mainstream Publishing Company, 2002.

TILLY, Charles. To explain political processes. **The American Journal of Sociology**, v. 100, n. 6, p. 1594-1610, 1995. DOI: <https://doi.org/10.1086/230673>

UNLUCAN, Dogan. Jersey manufacturers in football/soccer: the analysis of current jersey manufacturers of 1061 football/soccer clubs in top leagues of 72 countries. **Soccer & Society**, v. 15, n. 3, p. 314-333, 2014. DOI: <https://doi.org/10.1080/14660970.2012.753539>

WILLIAMS, Raymond. **Marxism and literature**. New York: Oxford University Press, 1977.

WINNER, David. **Those feet**: a sensual history of English soccer. New York: The Overlook Press, 2013.

Resumo: Este ensaio presta homenagem a Peter Donnelly, importante colaborador do desenvolvimento da sociologia do esporte, ao revisitar uma previsão que ele fez na década de 1980, sobre os efeitos da crescente exploração comercial do futebol. Levando em consideração o fornecedor oficial de uniformes esportivos para diversos clubes e seleções nacionais de futebol, totalizando mais de 250 casos, a presente pesquisa revela a magnitude da concentração financeira e geográfica que caracteriza uma parcela significativa desse ramo de atividade industrial. Em seguida, o artigo argumenta que, do ponto de vista da produção material de equipamentos esportivos, a enorme diversidade regional e nacional do mundo do futebol profissional desaparece, dando lugar a um cenário bastante homogêneo, no qual um pequeno número de empresas multinacionais luta por hegemonia – com clubes e seleções nacionais atuando, em essência, como representantes dos interesses de grandes conglomerados.

Palavras-chave: Futebol. Equipamentos esportivos. Indústria manufatureira. Uniformes.

Resumen: Este ensayo rinde homenaje a Peter Donnelly, un importante colaborador al desarrollo de la sociología del deporte, revisitando una predicción que hizo en la década de 1980 sobre los efectos de la creciente explotación comercial del fútbol. Considerando al proveedor oficial de uniformes deportivos para diversos clubes y selecciones nacionales de fútbol, que suman más de 250 casos, la presente investigación revela la magnitud de la concentración financiera y geográfica que caracteriza a una parte importante de este sector de actividad industrial. El artículo argumenta que, desde el punto de vista de la producción material de equipos deportivos, la enorme diversidad regional y nacional del mundo del fútbol profesional desaparece, dando lugar a un escenario bastante homogéneo, en el que un reducido número de empresas multinacionales luchan por hegemonía —con clubes y selecciones nacionales que actúan, en esencia, como representantes de los intereses de grandes conglomerados.

Palabras clave: Fútbol. Equipos deportivos. Industria manufacturera. Uniformes.

USE LICENSE

This is an article published in open access (Open Access) under the Creative Commons Attribution 4.0 International license (CC BY 4.0), which allows use, distribution, and reproduction in any medium, as long as the original work is correctly cited. More information at: <https://creativecommons.org/licenses/by/4.0>

CONFLICT OF INTERESTS

The author declares that there is no conflict of interest in this study.

AUTHOR CONTRIBUTIONS

Guilherme Reis Nothen: Research and writing.

FUNDING

This study was not supported by funding sources.

HOW TO REFERENCE

NOTHEN, Guilherme Reis. The financial and geographical concentration of the soccer uniform industry – a tribute to Peter Donnelly. **Movimento**, v. 28, p. e28077, Jan./Dec. 2022. DOI: <https://doi.org/10.22456/1982-8918.125939>

EDITORIAL RESPONSIBILITY

Alex Branco Fraga*, Elisandro Schultz Wittizorecki*, Mauro Myskiw*, Raquel da Silveira*

*Universidade Federal do Rio Grande do Sul, Escola de Educação Física, Fisioterapia e Dança, Porto Alegre, RS, Brazil.