

Sports Apparel Market in Japan: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the sports apparel market with the following conditions:

1. Research period: August to November, 2015
2. Research target: Sports related enterprises (manufacturers, wholesalers, and retailers)
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/email surveys, and in-mail questionnaire

<What is the Sports Apparel Market?>

The sports apparel market in this research indicates clothing made specially for doing the following 13 categories of sports; training, golf, outdoors, soccer/futsal, lifestyle, baseball/softball, tennis, track & field/running, swimming, ski/snowboard, basketball, fitness, and others. The “others” include sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

<What is the Functional Underwear?>

The functional underwear in this research indicates compression-support-type undergarments that provide some kind of effect to the body by wearing it. Depending on the type of functional underwear, the following effects are expected; improvement of athletic abilities, fatigue prevention, support for muscles and joints, and support of core body to keep the correct posture. The functional underwear market is included in the sports apparel market, and is positioned as one of the underwear types in each of sports categories.

<What are Sports Supporters/Belts?>

The sports supporters/belts in this research indicate those supporters or belts that absorb impacts to the joints and support athletic abilities by wearing them at the time of doing sports or exercises. Taping tapes, supporters for placing on crotches (athletic supporters), and magnetism-used necklaces (or similar products) are not included. Note that this research only targets the brands and products sold at certain sports goods retailers, so that any products sold at medical facilities, pharmacies and drugstores are not included.

◆ Key Findings

■ **Shipment Volume of Domestic Sports Apparel Market in 2015 Projected to Reach 100.8% on Y-o-Y Basis, Remaining Positive Growth**

The sports apparel market in 2015 is likely to achieve 524.160 billion yen, 100.8% of the size of the previous year, based on the shipment value at manufacturers. Although the apparel wear markets for soccer/futsal, track & field/running, and ski/snowboards decreased as a reaction of expansion in 2014, other nine categories are projected to successfully exceed the 2014 results.

■ **Training Wear Market in 2015 Likely to Attain 122.7 Billion Yen, 100.6% on Y-o-Y Basis**

The domestic shipment value of training wear in 2015 is projected to attain 122.7 billion yen, 100.6% of the size of the previous year. Expansion in the shipment of training wear is expected, because of favorable sales for spring-summer seasons stemming from good weathers in 2015

(unlike unusual weathers of 2014), and also because of the leading sports merchandizers scheduled to open more shops. On the other hand, however, if the influence of the warmer-than-usual winter is larger than expected, the market size in 2015 can be less than that of the previous year.

■ **Lifestyle Wear Market in 2015 Manages Positive Growth, Driven by Sales of High-Ranking Brands**

The domestic lifestyle wear market in 2015 is to achieve 39.4 billion yen, 103.7% of the size of the previous year, based on the shipment value of manufacturers. Especially, the steady sales of high-ranking brands at select shops and direct stores of makers are likely to raise the shipment, which is considered to uplift the market size as a whole.

■ **Trends towards Casual Wear Raising Outdoor Wear Market in 2015**

The domestic outdoor wear market in 2015 is projected to attain 82.8 billion yen, 103.5% of the size in the previous year, based on the shipment value of manufacturers. With number of entry-level climbers decreasing, the demands from mountain-climbing sector cannot be so prosperous. However, increasing number of brands has begun reaching for customers looking for lifestyle clothing that can be worn in town more casually. Especially those brands with improved awareness have succeeded in acquiring such new customers, which assures steady market growth.

◆ **Report format:**

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■ Table 1: Transition of Size of Domestic Sports Apparel Market

(Left: Million yen; Right above: Composition rate, Right below: Y-on-Y)

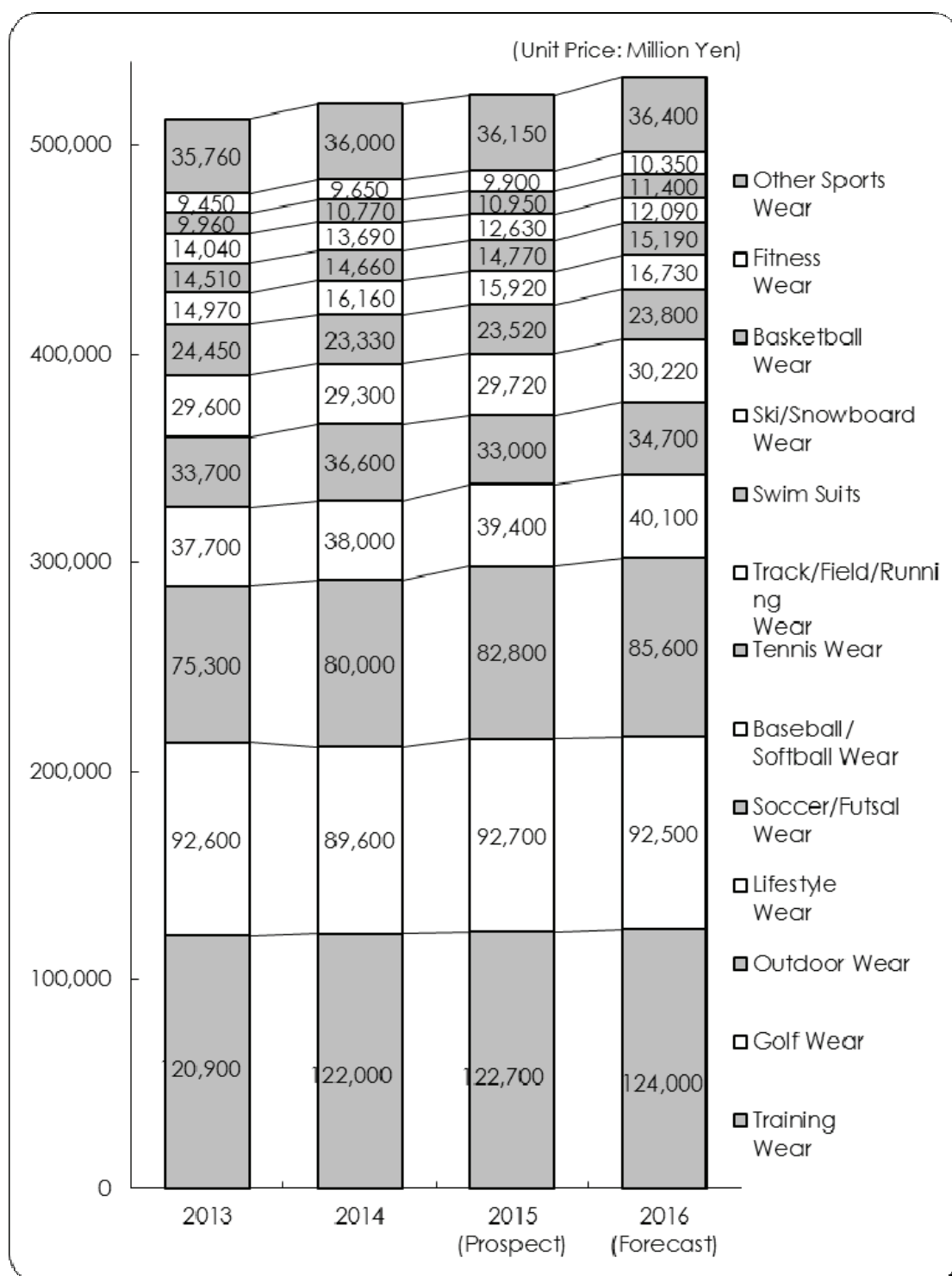
	2013		2014		2015 (Prospect)		2016 (Forecast)	
		%		%		%		%
Training Wear	120,900	23.6%	122,000	23.5%	122,700	23.4%	124,000	23.3%
		-		100.9%		100.6%		101.1%
Golf Wear	92,600	18.1%	89,600	17.2%	92,700	17.7%	92,500	17.4%
		-		96.8%		103.5%		99.8%
Outdoor Wear	75,300	14.7%	80,000	15.4%	82,800	15.8%	85,600	16.1%
		-		106.2%		103.5%		103.4%
Lifestyle Wear	37,700	7.3%	38,000	7.3%	39,400	7.5%	40,100	7.5%
		-		100.8%		103.7%		101.8%
Soccer/Futsal Wear	33,700	6.6%	36,600	7.0%	33,000	6.3%	34,700	6.5%
		-		108.6%		90.2%		105.2%
Baseball/Softball Wear	29,600	5.8%	29,300	5.6%	29,720	5.7%	30,220	5.7%
		-		99.0%		101.4%		101.7%
Tennis Wear	24,450	4.8%	23,330	4.5%	23,520	4.5%	23,800	4.5%
		-		95.4%		100.8%		101.2%
Track/Field/Running Wear	14,970	2.9%	16,160	3.1%	15,920	3.0%	16,730	3.1%
		-		107.9%		98.5%		105.1%
Swim Suits	14,510	2.8%	14,660	2.8%	14,770	2.8%	15,190	2.8%
		-		101.0%		100.8%		102.8%
Ski/Snowboard Wea	14,040	2.7%	13,690	2.6%	12,630	2.4%	12,090	2.3%
		-		97.5%		92.3%		95.7%
Basketball Wear	9,960	1.9%	10,770	2.1%	10,950	2.1%	11,400	2.1%
		-		108.1%		101.7%		104.1%
Fitness Wear	9,450	1.8%	9,650	1.9%	9,900	1.9%	10,350	1.9%
		-		102.1%		102.6%		104.5%
Other Sports Wear	35,760	7.0%	36,000	6.9%	36,150	6.9%	36,400	6.8%
		-		100.7%		100.4%		100.7%
Total	512,940	100.0%	519,760	100.0%	524,160	100.0%	533,080	100.0%
		-		101.3%		100.8%		101.7%

Notes:

Survey by Yano Research Institute

1. The market size is based on the shipment value of manufacturers.
2. "Other Sports Wear" include sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

■ **Figure 1: Transition of Shipment volume of Domestic Sports Apparel Market by Category**



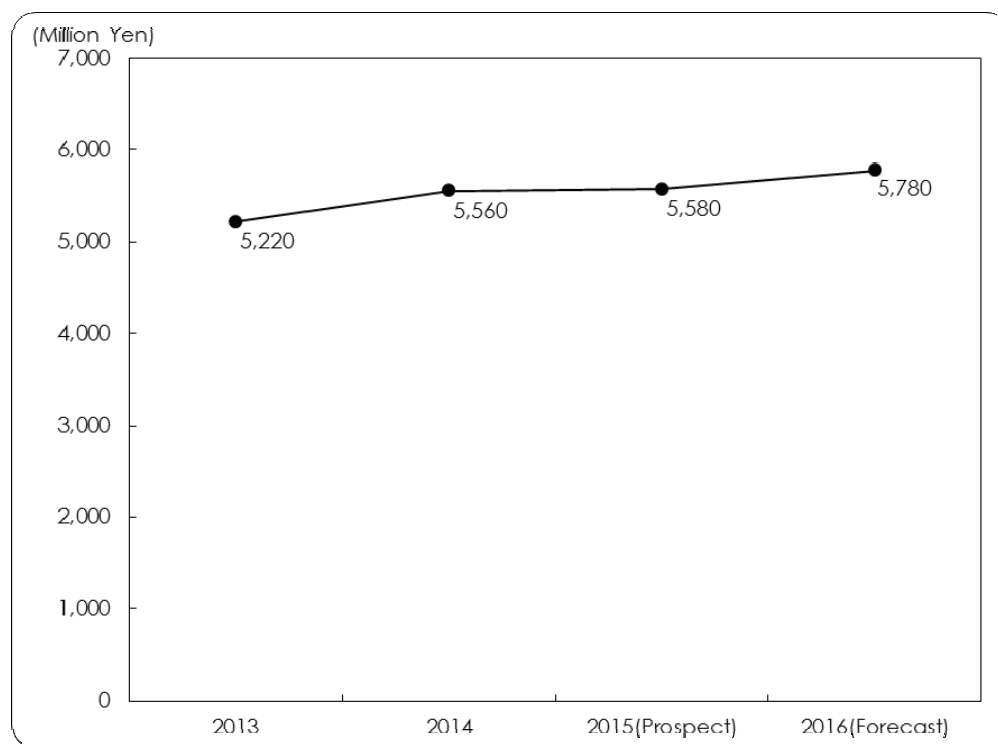
Notes:

Survey by Yano Research Institute

3. The market size is based on the shipment value of manufacturers.

4. "Other Sports Wear" includes sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

■ **Figure 2: Transition of Size of Compression-Supported Functional Underwear Market**



Survey by Yano Research Institute

Notes:

5. The market size is based on the shipment value of manufacturers.
6. This research only targets the brands and products sold at certain sports goods retailers, so that any products sold at medical facilities, pharmacies and drugstores are not included.