

**The data book on the Sporting Goods Industry in Japan**  
**<1st English Edition>**

➤ **Research Outline**

**Yano Research Institute has conducted a study on the sporting goods industry according to the following research outline.**

1. Research objective:

The objective of this research is to provide fundamental data on the sporting goods market in Japan, and information on distinctive features of the latest market trends and on status of major market players by conducting comprehensive researches targeted at most major players of the sporting goods industry in Japan.

2. Research items: Sporting goods (16 categories: Golf, Ski, Fishing, Athletic wear, Outdoor, Sports shoes, Tennis, Swimming, Baseball & Softball, Marine sports, Snowboarding, Cycle sports, Badminton, Martial arts, Table tennis and Fitness)

3. Research targets: 450 major Japanese companies dealing with sporting goods, including manufacturers, wholesalers and retailers

4. Research period: From November 2008 to February 2009

➤ **Report contents**

**<Overview of the market>**

- Current status and future prospect of the sporting goods market in Japan
- Transition of the sporting goods sale by manufacturer

**<Market trend by product category>**

- Market size of the sporting goods in shipment value
- Percentage ratio of sales by item
- Shipment and market share by manufacturer within category
- Market size transition of the Japanese domestic market

➤ **Report format:**

Published report: "The data on Sporting Goods Industry in Japan '09"

Issued in: April 2009

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Format: 273 pages in A4 format

Price: 100,000 yen (5,000 yen of consumption tax will be additionally charged for sales in Japan.)

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➤ **About the 1st edition of English version:**

"The data on Sporting Goods Industry in Japan '09" is the 1st edition of English version of the data book on sporting goods market in Japan. This book contains all the data from exclusive annual marketing report on Japanese sporting goods market titled, "Sporting Goods Industry 2009" which we have been publishing for more than twenty years.

\*While this data book contains all the data covered in the "Sporting Goods Industry 2009", if you wish to study more qualitative aspects of the market, please look into further details with our "Sporting Goods Industry" written in Japanese.

## ➔ Overview of latest trends of the sporting goods market

The total shipment value of sporting goods in Japan in 2008 is projected to be 1,276 billion and 310 million yen, 101.9% year-on-year. The market has achieved a positive growth for the fourth consecutive year from 2005 after hitting the bottom in 2004, and it is now on the trend toward a stable growth.

The shrinkage of the market until 2004 arose mainly because the markets of such recreational sports as golf and winter sports, which used to be very large in scale, shrunk due to the prolonged sluggish sales. Since around 2003, however, the market has started to show a sign of recovery that were led by the growth of “fitness” category due to the yoga and the Pilates booms that met the trends of health and beauty-consciousness of women. This trend consequently formed the “wellness” market as different types of demands were created mainly by diversified women’s exercises including running in unprecedented boom, walking that everybody can start easily, light trekking, fitness swimming, etc. In addition, in the field of sportswear, the “athletic wear” market that successfully met the demand for multi-purpose products has continuously been growing by taking the practice wear market not including game shirts of each category of sports.

The growth of the “athletic wear” market stands out among all categories of sporting goods market covered in this report, and 139.5 billion yen of market size in 2000 grew to 232.8 billion yen (estimate) in 2008. It grew by 66.9% and 93.3 billion yen was added in terms of shipment value during the period. This amount (93.3 billion yen) is equivalent to 7% of the total sporting goods market in 2008. The major growth factor had been that the market had successfully satisfied the needs of non-sports use application by making products more fashionable. In addition to that, growth of the “underwear” market is now regarded as another important growth factor. The “underwear” in nature is not designed for specific categories of sports. Furthermore, the “compression type” underwear that has been prominently becoming more popular has a function of “fatigue alleviation”, a factor that is related to health, in addition to “performance improvement”, a function that the sports wear can effectively provide, and the market successfully responded to the demand from general users as well as from athletes by suggesting a new fashion style of layered clothing. The compression type underwear is still a category that attracts a lot of attention, increasing its presence in the market.

It is no doubt that increasing health-consciousness among adult men and women, or in more particular, intention to take measures to clear the examination for metabolic syndrome implemented in April 2008 greatly contributed to the growth of the sporting goods market. As the topic is frequently reported nowadays through the media, it should be reasonable to think that even the people who had not done exercise before have started to be conscious about “doing some sports (exercises)”. Markets of such exercises as running, cycling, walking, light trekking and hiking have certainly been expanding by responding to such consciousness about exercise.

## 【 Market Size of Sporting Goods in Japan (SHIPMENT value basis) 】

Units: Mil. Yen, % (Upper row : Percentage ratio, Lower row : Year-on-year ratio)

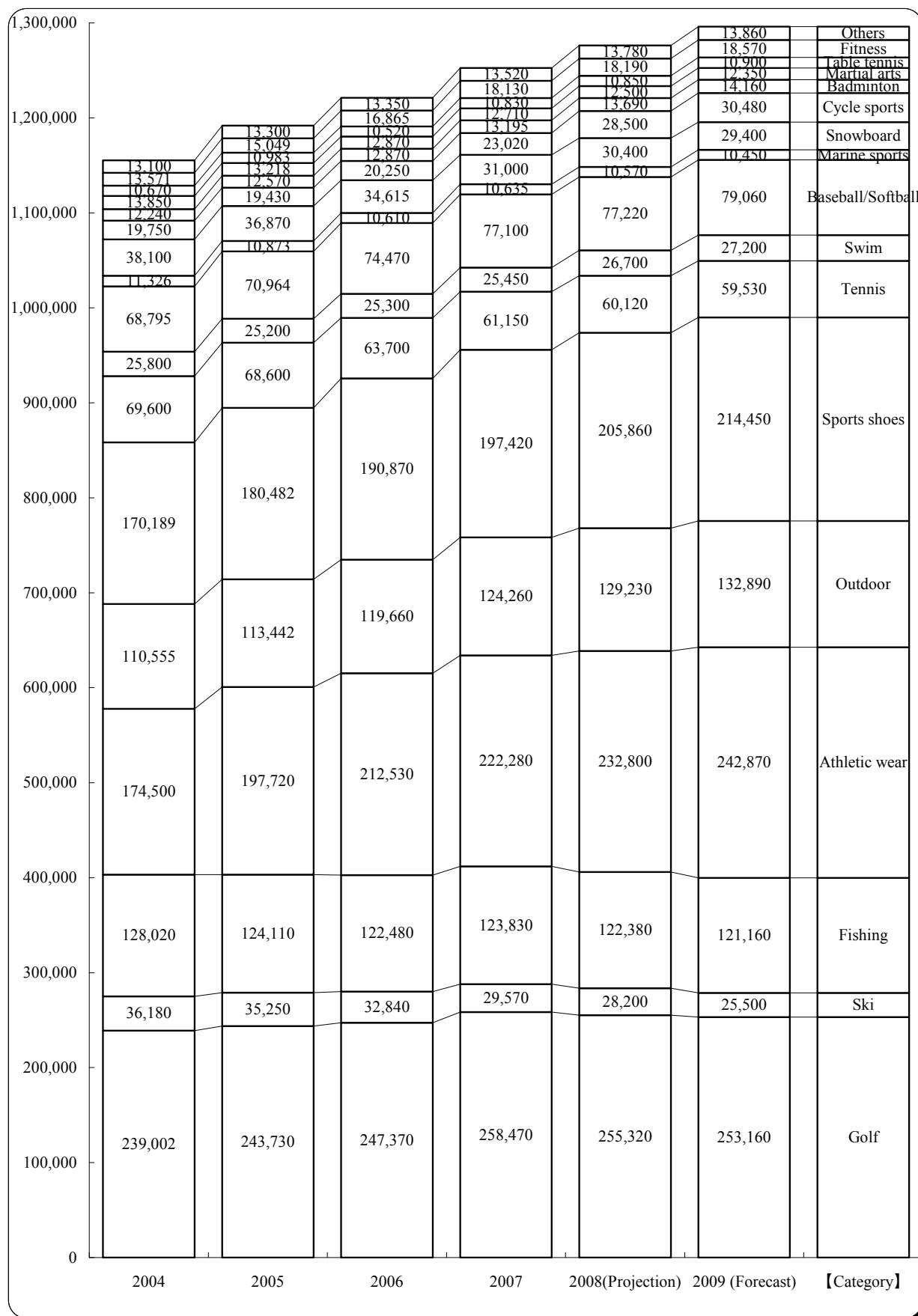
	2004		2005		2006		2007		2008(Projection)		2009 (Forecast)	
		%		%		%		%		%		%
Golf	239,002	20.7	243,730	20.5	247,370	20.3	258,470	20.6	255,320	20.0	253,160	19.5
		-		102.0		101.5		104.5		98.8		99.2
Ski	36,180	3.1	35,250	3.0	32,840	2.7	29,570	2.4	28,200	2.2	25,500	2.0
		-		97.4		93.2		90.0		95.4		90.4
Fishing	128,020	11.1	124,110	10.4	122,480	10.0	123,830	9.9	122,380	9.6	121,160	9.3
		-		96.9		98.7		101.1		98.8		99.0
Athletic wear	174,500	15.1	197,720	16.6	212,530	17.4	222,280	17.7	232,800	18.2	242,870	18.7
		-		113.3		107.5		104.6		104.7		104.3
Outdoor	110,555	9.6	113,442	9.5	119,660	9.8	124,260	9.9	129,230	10.1	132,890	10.3
		-		102.6		105.5		103.8		104.0		102.8
Sports shoes	170,189	14.7	180,482	15.1	190,870	15.6	197,420	15.8	205,860	16.1	214,450	16.5
		-		106.0		105.8		103.4		104.3		104.2
Tennis	69,600	6.0	68,600	5.8	63,700	5.2	61,150	4.9	60,120	4.7	59,530	4.6
		-		98.6		92.9		96.0		98.3		99.0
Swim	25,800	2.2	25,200	2.1	25,300	2.1	25,450	2.0	26,700	2.1	27,200	2.1
		-		97.7		100.4		100.6		104.9		101.9
Baseball/Softball	68,795	6.0	70,964	6.0	74,470	6.1	77,100	6.2	77,220	6.1	79,060	6.1
		-		103.2		104.9		103.5		100.2		102.4
Marine sports	11,326	1.0	10,873	0.9	10,610	0.9	10,635	0.8	10,570	0.8	10,450	0.8
		-		96.0		97.6		100.2		99.4		98.9
Snowboard	38,100	3.3	36,870	3.1	34,615	2.8	31,000	2.5	30,400	2.4	29,400	2.3
		-		96.8		93.9		89.6		98.1		96.7
Cycle sports	19,750	1.7	19,430	1.6	20,250	1.7	23,020	1.8	28,500	2.2	30,480	2.4
		-		98.4		104.2		113.7		123.8		106.9
Badminton	12,240	1.1	12,570	1.1	12,870	1.1	13,195	1.1	13,690	1.1	14,160	1.1
		-		102.7		102.4		102.5		103.8		103.4
Martial arts	13,850	1.2	13,218	1.1	12,870	1.1	12,710	1.0	12,500	1.0	12,350	1.0
		-		95.4		97.4		98.8		98.3		98.8
Table tennis	10,670	0.9	10,983	0.9	10,520	0.9	10,830	0.9	10,850	0.9	10,900	0.8
		-		102.9		95.8		102.9		100.2		100.5
Fitness	13,571	1.2	15,049	1.3	16,865	1.4	18,130	1.4	18,190	1.4	18,570	1.4
		-		110.9		112.1		107.5		100.3		102.1
Others	13,100	1.1	13,300	1.1	13,350	1.1	13,520	1.1	13,780	1.1	13,860	1.1
		-		101.5		100.4		101.3		101.9		100.6
Total	1,155,248	100.0	1,191,791	100.0	1,221,170	100.0	1,252,570	100.0	1,276,310	100.0	1,295,990	100.0
		-		103.2		102.5		102.6		101.9		101.5

\*The above numbers (including those for 2007 or before) are based on research and calculation newly conducted during the research period of this report (Nov. 2008-Feb. 2009)

Estimated by Yano Research Institute Ltd.

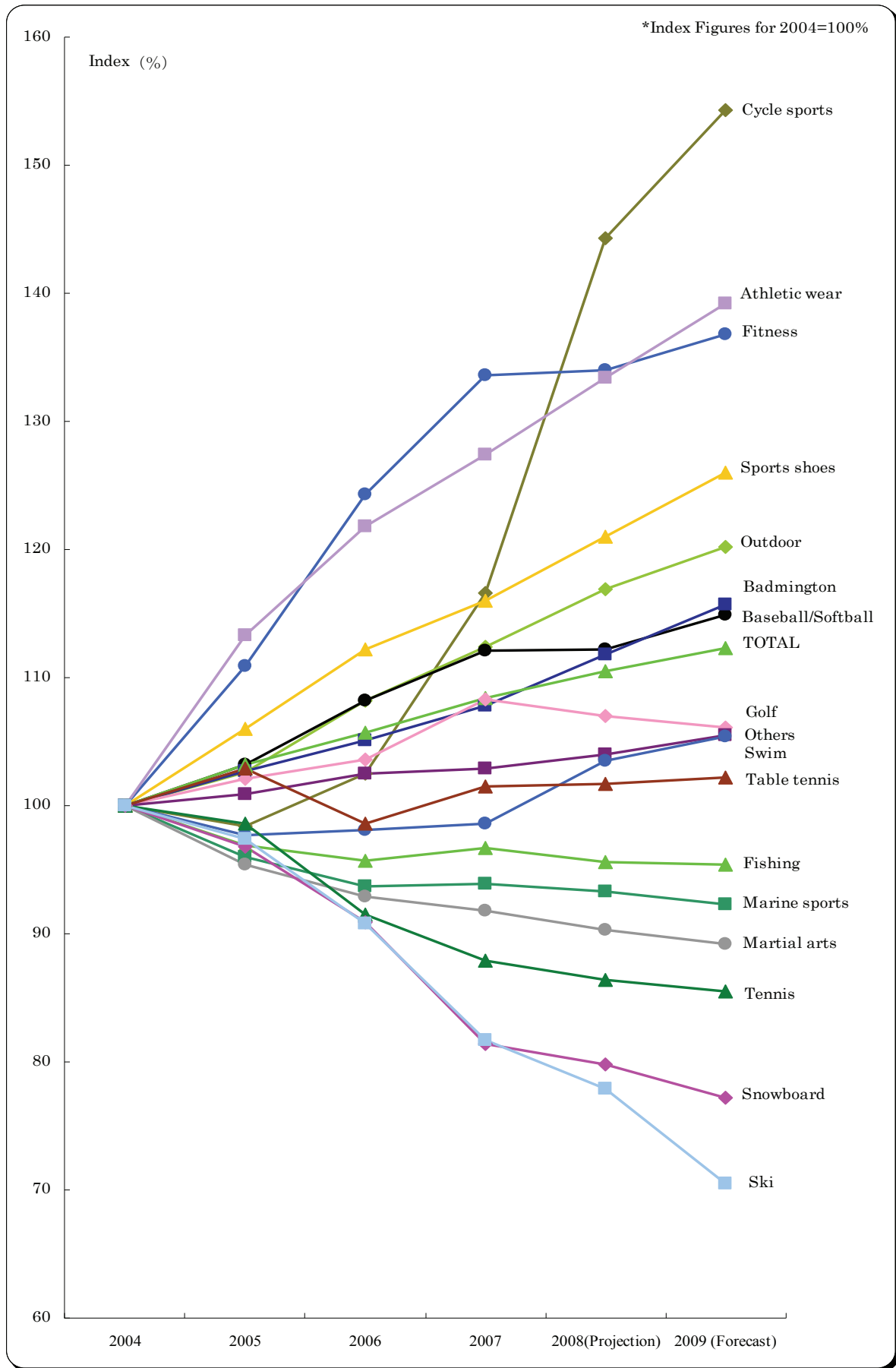
**【Market Size of Sporting Goods in Japan by Category (SHIPMENT value basis)】**

(Unit: Mil. Yen)



Estimated by Yano Research Institute Ltd.

**【 Shipment Value Index of the Sporting Goods Market in Japan by Category 】**



Estimated by Yano Research Institute Ltd.