

Sporting Goods Market in Japan: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on domestic sporting goods market with the following conditions:

1. Research period: From December 2012 to March 2013
2. Research targets: Sporting goods manufacturers, import traders, wholesalers, and retailers
3. Research methodologies: Face-to-face interviews, and mail-in questionnaire survey

What is the sporting goods market in this survey?

The sporting goods market in this survey targets equipments and goods used in the following 18 major categories; Golf, Skiing/Snowboarding, Fishing, Athletic wear, Outdoor, Sports shoes, Tennis, Swimming, Baseball & Softball, Cycle sports, Badminton, Martial art, Table tennis, Fitness, Soccer/Futsal, Basket ball, Volley ball and Rugby.

The market size is calculated based on the shipment value from manufacturers.

All the items of each category are listed in Table1 in this report.

◆ Key Findings

■ **Size of Domestic Sporting Goods Market in 2012 Likely to Expand to 103.4% of Previous Year**

The size of domestic sporting goods market in 2012 is anticipated to achieve 1,283.8 billion yen, 103.4% of the size in the previous year based on the shipment value of manufacturers. The market has, at last, managed to turn to an increase after three consecutive years of decline since 2009.

■ **Estimated Increase in 15 Categories for 2012**

With the influence from the Great East Japan Earthquake, 10 categories out of 18 categories in the sporting goods market declined in 2011. Partly due to the rebound from this tendency, 15 categories increased in 2012, leaving only 3 categories to decline.

■ **Four Consecutive Years of Steady Expansion since 2009 Achieved by Categories of Outdoor, Sports Shoes, and Fitness**

Steadiness is shown for the three categories, i.e. Outdoor, Sports Shoes, and Fitness, achieving four consecutive years of increase since 2009. One of the reasons is thought to be because the sports have become not just hobbies for some people who originally started them for health maintenance but something indispensable in their lifestyles once they experienced the feelings of achievement and joy through these sports.

■ **Size of Domestic Sporting Goods Market in 2013 Anticipated to be 102.4% of Previous Year**

The size of sporting goods market in 2013 is expected to reach 1,314.34 billion yen, 102.4% of the previous year based on the shipment volume of manufacturers, with most of the categories continue to succeed in expansion.

◆ **Report format:**

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■ **Table 1: Targeted Items within Major 18 Categories in this Research**

Category Name	Name of Items
1. Golf goods	Golf clubs*, wood clubs*, utility clubs*, iron clubs*, putter*, round balls*, range balls*, golf shoes*, caddie bags*, other bags and covers, golf gloves*, golf wear
2. Ski/Snowboarding goods	Ski boards*, ski boots*, ski bindings, ski wears, snowboards* snowboard boots* Snowboard bindings, snowboarding wear
3. Fishing goods	No particular categories
4. Athletic war	No particular categories
5. Outdoor goods	Outdoor wear, Outdoor shoes*, knapsacks/bags, tents/tarps, sleeping bags, lamps, cooking devices/dishes, fuels, tables/chairs, coolers/jugs
6. Sports shoes	Running shoes*, walking shoes*, multi-functional shoes*, children's shoes*, sports sandals*
7. Tennis goods	Hard tennis rackets*, soft tennis rackets*, hard tennis balls*, soft tennis balls*, tennis shoes*, hard tennis strings, soft tennis strings, bags/cases, tennis wear
8. Swimming goods	Swimming suits, swimming caps*, swimming goggles*
9. Baseball/Softball goods	Gloves*, bats*, balls*, spikes/training shoes*, baseball wear, softball wear, batting gloves, bags/cases, batting helmets*, protectors
10. Motorcycles/Motor bike goods	MTB*, road bikes*, other completed bikes*
11. Badminton goods	Badminton rackets*, shuttlecocks, badminton shoes*, badminton strings
12. Martial arts goods	Kendo goods, Judo goods, Karate goods
13. Table tennis goods	Table tennis rackets*, table tennis balls*, table tennis shoes*, rubbers*, table tennis wear
14. Fitness goods	Fitness wear, training shoes*
15. Soccer/Futsal goods	Soccer/futsal wear, soccer/futsal shoes*, shin guards, gloves for keepers, soccer/futsal balls
16. Basketball goods	Basketball shoes*, basketball wear, basketballs
17. Volleyball goods	Volleyball shoes*, volleyball wear, volleyballs
18. Rugby goods	Rugby shoes*, rugby wear, rugby balls*

YRI calculated the volume of items with "*".

■ **Table2: Transition of Estimated Size of Domestic Sporting Goods Market**

Million Yen,, Upper level: composition ratio (%), Lower level: Y-o-Y

	2008		2009		2010		2011		2012 (Estimate)		2013 (Estimate)	
		%		%		%		%		%		%
Golf	292,960	22.5	268,050	21.2	258,930	20.7	242,410	19.5	247,040	19.2	251,160	19.1
		-		91.5		96.6		93.6		101.9		101.7
Ski/Snowboard	58,670	4.5	54,770	4.3	52,650	4.2	51,560	4.2	51,980	4.0	52,010	4.0
		-		93.4		96.1		97.9		100.8		100.1
Fishing	125,110	9.6	124,980	9.9	119,870	9.6	112,430	9.1	115,900	9.0	119,390	9.1
		-		99.9		95.9		93.8		103.1		103.0
Atheletic wear	176,520	13.6	166,680	13.2	164,940	13.2	164,570	13.3	170,210	13.3	174,260	13.3
		-		94.4		99.0		99.8		103.4		102.4
Outdoor	131,510	10.1	136,000	10.8	142,490	11.4	156,230	12.6	164,990	12.9	173,950	13.2
		-		103.4		104.8		109.6		105.6		105.4
Sports Shoses	177,190	13.6	177,930	14.1	179,720	14.4	183,360	14.8	195,230	15.2	200,220	15.2
		-		100.4		101.0		102.0		106.5		102.6
Tennis	61,070	4.7	58,690	4.6	56,280	4.5	54,020	4.4	56,040	4.4	57,080	4.3
		-		96.1		95.9		96.0		103.7		101.9
Swimming	27,660	2.1	25,200	2.0	24,320	1.9	23,080	1.9	23,430	1.8	23,950	1.8
		-		91.1		96.5		94.9		101.5		102.2
Baseball/Soft ball	76,420	5.9	76,890	6.1	75,230	6.0	74,290	6.0	75,290	5.9	76,610	5.8
		-		100.6		97.8		98.8		101.3		101.8
Motor bicycle/ Motor bike	28,100	2.2	30,300	2.4	31,600	2.5	33,780	2.7	32,450	2.5	32,780	2.5
		-		107.8		104.3		106.9		96.1		101.0
Badminton	11,630	0.9	11,410	0.9	11,810	0.9	11,430	0.9	11,680	0.9	11,930	0.9
		-		98.1		103.5		96.8		102.2		102.1
Martial arts	13,360	1.0	12,610	1.0	12,980	1.0	12,780	1.0	12,700	1.0	12,480	0.9
		-		94.4		102.9		98.5		99.4		98.3
Table tennis	9,470	0.7	9,505	0.8	9,505	0.8	9,100	0.7	9,650	0.8	10,030	0.8
		-		100.4		100.0		95.7		106.0		103.9
Fitness	20,200	1.6	20,300	1.6	20,670	1.7	21,640	1.7	21,730	1.7	21,740	1.7
		-		100.5		101.8		104.7		100.4		100.0
Soccer/Futsal	59,140	4.5	59,110	4.7	57,630	4.6	58,320	4.7	62,620	4.9	63,510	4.8
		-		99.9		97.5		101.2		107.4		101.4
Basketball	20,460	1.6	19,770	1.6	19,540	1.6	20,030	1.6	20,560	1.6	20,740	1.6
		-		96.6		98.8		102.5		102.6		100.9
Volley ball	10,370	0.8	10,090	0.8	9,760	0.8	9,770	0.8	10,080	0.8	10,270	0.8
		-		97.3		96.7		100.1		103.2		101.9
Rugby	2,310	0.2	2,280	0.2	2,140	0.2	2,250	0.2	2,220	0.2	2,230	0.2
		-		98.7		93.9		105.1		98.7		100.5
Total	1,302,150	100.0	1,264,565	100.0	1,250,065	100.0	1,241,050	100.0	1,283,800	100.0	1,314,340	100.0
		-		97.1		98.9		99.3		103.4		102.4

Estimated by YRI