

Home Fashion Market in Japan: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on the home fashion market with the following conditions:

1. Research period: July to September, 2013
2. Research target: Manufacturers, wholesalers and retailers in the business of home fashion industry
3. Research methodologies: Face-to-face/telephone interviews by the specialized researchers, interviews via telephone, and literature research

<What is Home Fashion Market?>

The home fashion market in this research consists of the following seven categories: Bed linen/beddings, Towels, Nightwear/home wear, Home-use furniture, Home-use lighting fixtures, Interior fabrics, and Kitchenware/tableware. These categories are generally used for households, but some home-use furniture and kitchenware/tableware include demands from companies.

◆ Key Findings

■ Home Fashion Retail Market in 2013 Expected to Attain 3,145.9 Billion Yen, 101.8% of Size of Previous Year, Driven by Favorable Sales of Low-Price Goods from Mega Retailers and Increasing Demands for Expensive Genuine Articles

Demands in the home fashion market is apt to fluctuate in conjunction with new housing starts, since the items included in the market such as furniture and lighting fixtures for households have high ratio to be needed in newly-built or relocated residence. In addition to rising tendency in new housing starts from 2011 to 2012, consumers are turning their eyes on genuine articles, which are increasing the sales in spite of their expensiveness. This resulted the market to shift from a long-term downturn to a positive growth for two consecutive years in 2011 and 2012. This tendency seems to continue in 2013, with favorable sales of low-price goods from mega retailers and growing sales of expensive products like furniture at furniture-specialty stores.

■ Diversified and Complicated Consumer Demands Drove Sales Channels to Diversify and Made Consumers Selective

When viewing the home fashion market from sales channels' point of view, there are emerging shops gaining momentum by expanding in fashion buildings, shopping malls and other commercial facilities, while some others find their new way at online stores and outlet shops, in order for them to respond to diversified and complicated consumer demands. On the other hand, the conventional channels like department stores have shifted to save profits, which have led them

to review and correct their sales size to a more appropriate level.

◆ Report format:

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Language: Japanese

Format: 442 pages in A4 format

Price: 131,250 yen (6,250 yen of consumption tax shall be charged for the sales in Japan.)

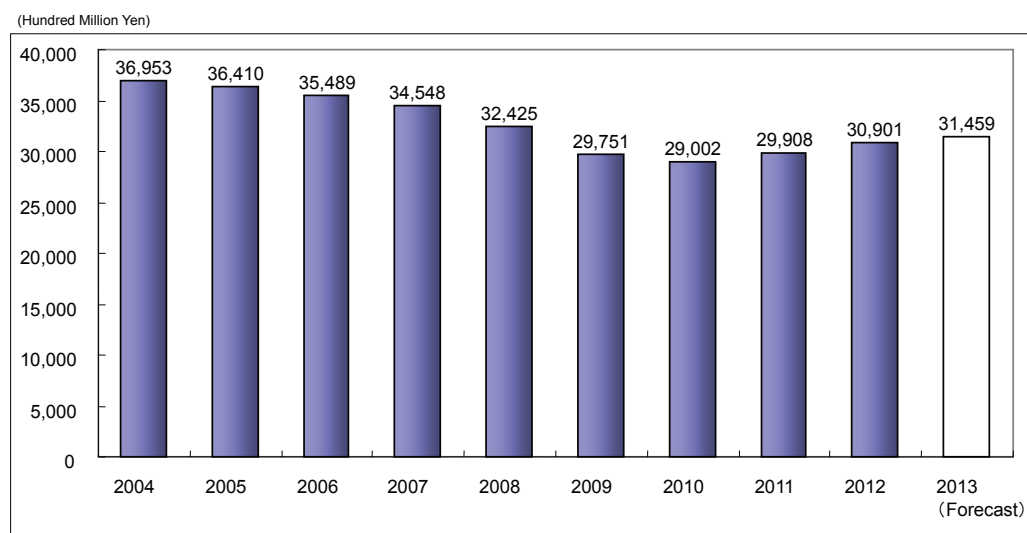
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■ **Figure 1: Transition of Size of Home Fashion Retail Market**



	2004		2005		2006		2007		2008		2009		2010.		2011		2012		2013	
Bed linen/beddings	5,645	94.1	5,680	100.6	5,490	96.7	5,159	94.0	4,878	94.6	4,681	96.0	4,708	100.6	4,918	104.5	5,123	104.2	5,307	103.6
Towel goods	1,775	92.4	1,730	97.5	1,685	97.4	1,640	97.3	1,620	98.8	1,525	94.1	1,445	94.8	1,480	102.4	1,560	105.4	1,610	103.2
Nightwear/home wear	1,778	98.4	1,799	101.2	1,841	102.3	1,745	94.8	1,661	95.2	1,417	85.3	1,445	102.0	1,517	105.0	1,482	97.7	1,500	101.2
Home furniture	12,350	93.9	11,901	96.4	10,989	92.3	10,808	98.4	10,020	92.7	9,206	91.9	8,491	92.2	8,815	103.8	9,215	104.5	9,216	100.0
Interior fabrics	6,494	100.1	6,605	101.7	6,667	100.9	6,520	97.8	6,031	92.5	5,368	89.0	5,404	100.7	5,458	101.0	5,504	100.8	5,556	100.9
Home lighting fixture	4,390	99.1	4,279	97.5	4,320	101.0	4,270	98.8	4,100	96.0	3,879	94.6	3,840	99.0	3,975	103.5	4,125	103.8	4,300	104.2
Kitchenware/Tableware	4,521	98.8	4,416	97.7	4,497	101.8	4,406	98.0	4,115	93.4	3,675	89.3	3,669	99.8	3,745	102.1	3,892	103.9	3,970	102.0

Notes:

1. The figures are based on the retail amounts.
2. The market size of “Bed linen/beddings” and “Nightwear/home wear” from 2004 to 2012 are extracted from “Shinso Interior Management 2012”, published by NIHON SHINSO SINBUN CO.,LTD. The market size forecast for 2013 was estimated by Yano Research Institute.
3. This research basically targets these categories used for households, but some home-use furniture and kitchenware/tableware include demands from companies.
4. Only market size of Interior fabrics was calculated based on fiscal years.