

## Shoes and Footwear Market in Japan: Key Research Findings 2014

### ◆ Research Outline

**Yano Research Institute has conducted a study on the domestic shoes and footwear market with the following conditions:**

1. Research period: December, 2014 to April, 2015
2. Research target: Manufacturers, wholesalers and retailers in the industry of shoes, footwear and shoe materials, and companies in peripheral industries, importers and exporters
3. Research methodologies: Face-to-face interviews by the expert researchers, questionnaire, literature research using statistic data from government ministries and agencies, and from related organizations.

**<What are Shoes and Footwear?>**

Shoes and footwear in this research indicate products such as “leather shoes,” “rubber shoes,” “chemical shoes,” “sandals,” and others categorized as “Footwear, gaiters and the like” in the Trade Statistics and Industrial Statistics.

### ◆ Key Findings

■ **Shoes and Footwear Market in FY2014 Projected to Attain 1,387.0 Billion Yen, 100.9% on Y-o-Y Basis**

The domestic shoes and footwear market in FY2013 rose for the second consecutive years to attain 1,375.0 billion yen, 100.9% of the size in the previous fiscal year. The market has been on the rise not only because imported brands and other expensive products sold well to the wealthy population, middle-income group, and the foreign tourists visiting Japan, but also casual sneakers have become a hit. This tendency is likely to continue, supporting the steadiness of the market to attain 1,387.0 billion yen, 100.9% of the size in the previous fiscal year.

■ **Sports Shoes Market in FY2014 Expected to Achieve 105.1% of Size of Previous Year**

Among entire shoes and footwear retail market in FY2014, the sports shoes market is likely to continue thriving, with its market size expected to achieve 578.0 billion yen, 105.1% of the size in the previous fiscal year. Among the sports shoes category, multi-purpose shoes are showing favorable sales, because casual shoes have become a trend both for men and women. On the other hand, however, the market of men’s shoes has shrunk to 98.7%, and women’s shoes to 97.0% from the previous fiscal year, respectively, and baby/infant’s shoes remained the same level to 100.0%.

### ◆ Report format:

Published report: “Shoes and Footwear Market 2015”

Issued on: April 30, 2015

Language: Japanese

Format: 435 pages in A4 format

Price: 125,000 yen (the consumption tax shall additionally be charged for the sales in Japan.)

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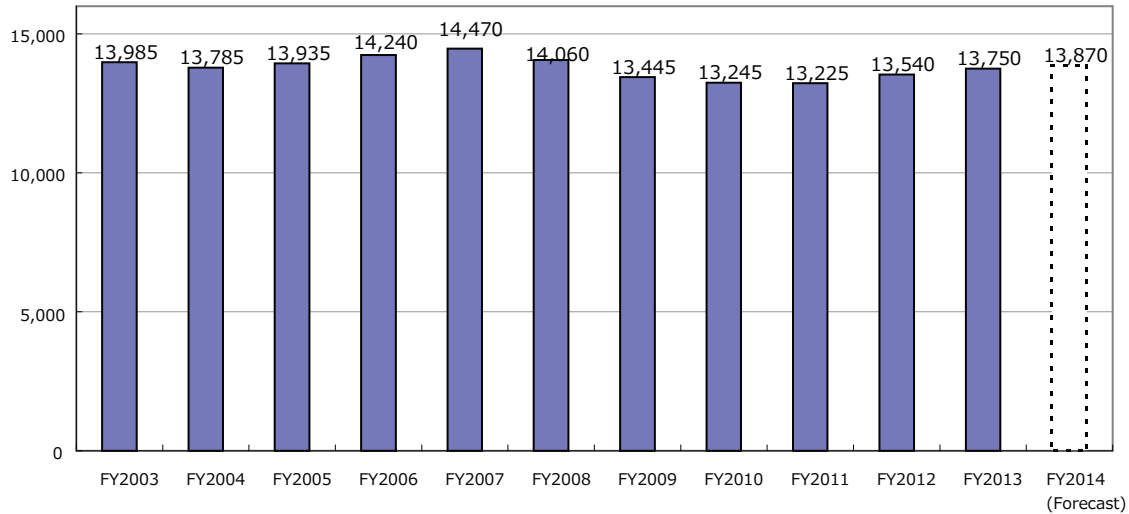
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■ **Figure 1: Transition of Size of Shoes and Footwear Market**

(Hundred Million Yen)



(Upper row: Hundred Million Yen, Lower row: %r Leve%)

	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014 (Forecast)
Market Size	13,985	13,785	13,935	14,240	14,470	14,060	13,445	13,245	13,225	13,540	13,750	13,870
Y-o-Y	98.2	98.6	101.1	102.2	101.6	97.2	95.6	98.5	99.8	102.4	101.6	100.9

Note:

1. The market size is based on retail values.

■ **Table 1: Transition of Shoes and Footwear Retail Market by Item**

	FY2008		FY2009		FY2010		FY2011		FY2012		FY2013		FY2014 (Forecast)	
	Y-o-Y	Mkt share	Y-o-Y	Mkt share	Y-o-Y	Mkt share	Y-o-Y	Mkt share	Y-o-Y	Mkt share	Y-o-Y	Mkt share	Y-o-Y	Mkt share
Men's Shoes	2,450	93.2%	2,300	93.9%	2,250	97.8%	2,190	97.3%	2,240	102.3%	2,280	101.8%	2,250	98.7%
		17.4%		17.1%		17.0%		16.6%		16.5%		16.6%		16.2%
Women's Shoes	4,100	94.5%	3,730	91.0%	3,670	98.4%	3,650	99.5%	3,730	102.2%	3,690	98.9%	3,580	97.0%
		29.2%		27.7%		27.7%		27.6%		27.5%		26.8%		25.8%
Sports Shoes	4,930	101.6%	4,935	100.1%	4,985	101.0%	5,040	101.1%	5,250	104.2%	5,500	104.8%	5,780	105.1%
		35.1%		36.7%		37.6%		38.1%		38.8%		40.0%		41.7%
Baby/Infant's Shoes	870	102.4%	900	103.4%	890	98.9%	880	98.9%	870	98.9%	860	98.9%	860	100.0%
		6.2%		6.7%		6.7%		6.7%		6.4%		6.3%		6.2%
Others	1,710	95.0%	1,580	92.4%	1,450	91.8%	1,465	101.0%	1,450	99.0%	1,420	97.9%	1,400	98.6%
		12.2%		11.8%		10.9%		11.1%		10.7%		10.3%		10.1%
Total	14,060	97.2%	13,445	95.6%	13,245	98.5%	13,225	99.8%	13,540	102.4%	13,750	101.6%	13,870	100.9%
		100.0%		100.0%		100.0%		100.0%		100.0%		100.0%		100.0%

Notes:

2. Figures are based on retail values.
3. Comp. ratio stands for composition ratio.
4. "Sports shoes" in this research indicate products that are shipped as "sports shoes" by manufacturers of sports shoes, shoes and footwear.
5. "Others" include boots, work shoes and etc.