

Sports Shoes Market in Japan: Key Research Findings 2015

◆ Research Outline

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

1. Research period: From May to August, 2015
2. Research targets: Sports shoes manufacturers, import traders, wholesalers, and retailers
3. Research methodologies: Face-to-face interviews, and mail-in questionnaire

What is the Sports Shoes Market?

The sports shoes market in this research targets the products shipped by sporting goods manufacturers and shoes manufacturers as “sports shoes.” The market size is calculated based on shipment volume and shipment value.

◆ Key Findings

■ **Domestic Shipment of Sports Shoes Market in 2014 Expanded to 105.6% on Y-o-Y Basis in Volume, or 109.1% in Value**

There were 85.81 million pairs of sports shoes shipped domestically in 2014, 105.6% of the size in the previous year, or 109.1 % in value at 331.67 billion yen. The market had a concern of when the recovery from the consumption tax increase may be. However, the market achieved favorable results in many of the categories of the market to exceed the results in the preceding year.

■ **Multi-Purpose (General Casual) Shoes in 2014 Leaped to Attain 112.1% in Volume and 122.1% in Value of Previous Year**

The domestic shipment of the multi-purpose shoes (general casual sneakers) expanded to 112.1 % of the preceding year in volume, or 25.72 million pairs, which is 122.1% in shipment value at 95.430 billion yen. In addition to unprecedented boom of sneaker shoes, bulk purchase by the foreign travelers in Japan has largely contributed to the market growth. Also, increasing number of women, who had not been familiar with those shoes before, have become customers recently to raise the shipment ratio of sneakers for women at each of the manufacturer. Because the booming sneaker sales and roaring demands by the foreign tourists are likely to continue, the domestic shipment value in 2015 is expected to exceed 100 billion yen to reach 109.1 billion yen.

■ **Domestic Shipment of Sports Shoes Market in 2015 Expected to Achieve 105.0 % of Previous Year in Volume, or 107.7% in Value.**

Domestic shipment of sports shoes in 2015 is likely to achieve 90.13 million pairs, 105.0% of the volume in the year before, or 357.290 billion yen, 107.7% of the value in the preceding year. The market is expected to continue growing for 2015 at every category, including multi-purpose shoes, running shoes, and walking shoes.

◆ **Report format:**

Published Report: “Sports Shoes Business 2015”

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■ **Table 1: Transition of Domestic Shipment Volume of Sports Shoes**

(Unit: thousand pairs, upper level: composition ratio, lower level: year-to-year comparison)

	2012		2013		2014		2015 (Forecast)	
		%		%		%		%
Multi-Purpose Shoes (General casual sneakers)	22,030	27.9%	22,940	28.2%	25,720	30.0%	27,870	30.9%
		-		104.1%		112.1%		108.4%
Running shoes	17,900	22.6%	18,460	22.7%	19,360	22.6%	20,040	22.2%
		-		103.1%		104.9%		103.5%
Walking shoes	6,550	8.3%	7,150	8.8%	7,860	9.2%	8,330	9.2%
		-		109.2%		109.9%		106.0%
Kids/Infants shoes	6,830	8.6%	6,740	8.3%	7,110	8.3%	7,570	8.4%
		-		98.7%		105.5%		106.5%
Soccer shoes	6,220	7.9%	6,305	7.8%	6,260	7.3%	6,405	7.1%
		-		101.4%		99.3%		102.3%
Outdoor shoes	5,140	6.5%	5,290	6.5%	5,315	6.2%	5,370	6.0%
		-		102.9%		100.5%		101.0%
Baseball/Softball shoes	2,560	3.2%	2,590	3.2%	2,480	2.9%	2,550	2.8%
		-		101.2%		95.8%		102.8%
Sports sandals	2,340	3.0%	2,250	2.8%	2,320	2.7%	2,310	2.6%
		-		96.2%		103.1%		99.6%
Tennis shoes	1,940	2.5%	1,990	2.4%	1,935	2.3%	2,025	2.2%
		-		102.6%		97.2%		104.7%
Golf shoes	1,830	2.3%	1,880	2.3%	1,650	1.9%	1,700	1.9%
		-		102.7%		87.8%		103.0%
Basketball shoes	1,185	1.5%	1,255	1.5%	1,425	1.7%	1,535	1.7%
		-		105.9%		113.5%		107.7%
Training shoes	1,530	1.9%	1,300	1.6%	1,180	1.4%	1,210	1.3%
		-		85.0%		90.8%		102.5%
Others	3,045	3.8%	3,140	3.9%	3,195	3.7%	3,215	3.6%
		-		103.1%		101.8%		100.6%
Total	79,100	100.0%	81,290	100.0%	85,810	100.0%	90,130	100.0%
		-		102.8%		105.6%		105.0%

Notes:

1. The figures are based on the shipment volume at manufacturers.
2. “Others” include shoes for volley ball, badminton, table tennis, rugby, handball, American football, etc.
3. The values are rounded, so that some totaled values in the table may not match.

■ **Table 2: Transition of Domestic Shipment Value of Sports Shoes**

(Unit: Million yen, upper level: composition ratio, lower level: year-to-year)

	2012		2013		2014		2015 (Forecast)	
		%		%		%		%
Multi-Purpose Shoes (General casual sneakers)	71,780	24.9%	78,140	25.7%	95,430	28.8%	109,100	30.5%
		-		108.9%		122.1%		114.3%
Running shoes	54,430	18.9%	56,610	18.6%	61,570	18.6%	65,300	18.3%
		-		104.0%		108.8%		106.1%
Walking shoes	42,310	14.7%	45,650	15.0%	48,910	14.7%	51,070	14.3%
		-		107.9%		107.1%		104.4%
Outdoor shoes	27,980	9.7%	29,460	9.7%	30,180	9.1%	30,780	8.6%
		-		105.3%		102.4%		102.0%
Soccer shoes	19,560	6.8%	20,440	6.7%	20,760	6.3%	21,660	6.1%
		-		104.5%		101.6%		104.3%
Kids/Infants shoes	14,400	5.0%	14,340	4.7%	15,780	4.8%	16,940	4.7%
		-		99.6%		110.0%		107.4%
Golf shoes	11,300	3.9%	12,080	4.0%	10,960	3.3%	12,100	3.4%
		-		106.9%		90.7%		110.4%
Baseball/Softball shoes	10,320	3.6%	10,400	3.4%	10,070	3.0%	10,350	2.9%
		-		100.8%		96.8%		102.8%
Basketball shoes	6,990	2.4%	7,790	2.6%	8,870	2.7%	9,850	2.8%
		-		111.4%		113.9%		111.0%
Tennis shoes	7,860	2.7%	8,330	2.7%	8,230	2.5%	8,710	2.4%
		-		106.0%		98.8%		105.8%
Training shoes	6,030	2.1%	5,090	1.7%	4,830	1.5%	4,910	1.4%
		-		84.4%		94.9%		101.7%
Sports sandals	2,990	1.0%	2,890	1.0%	3,090	0.9%	3,140	0.9%
		-		96.7%		106.9%		101.6%
Others	12,340	4.3%	12,660	4.2%	12,990	3.9%	13,380	3.7%
		-		102.6%		102.6%		103.0%
Total	288,290	100.0%	303,880	100.0%	331,670	100.0%	357,290	100.0%
		-		105.4%		109.1%		107.7%

Notes:

4. The figures are based on the shipment value at manufacturers.
5. "Others" include shoes for volley ball, badminton, table tennis, rugby, handball, American football, etc.
6. The values are rounded, so that some totaled values in the table may not match.