

Sports Shoes Market in Japan: Key Research Findings 2016

◆ 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, 2016
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 indicates the market of 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, respectively.

◆ Key Findings

■ **Domestic Shipment of Sports Shoes Market in 2015 Expanded to 104.1% on Y-o-Y Basis in Volume, or 106.5% in Value**

The domestic shipment of sports shoes in 2015 was 89,140 thousand pairs in volume, 104.1% of the size of the previous year, or 352.460 billion yen in value, 106.5 % of the preceding year.

■ **Multi-Purpose Shoes (General Casual Sneakers) in 2015 Rose to 109.2% of Previous Year in Volume, or 115.2% in Value**

The domestic shipment of the multi-purpose shoes (general casual sneakers), which occupies 30% of the entire sports shoes market, expanded to 109.2% of the shipment volume of the previous year to attain 28,080 thousand pairs, or 115.2% of the shipment value of the preceding year to achieve 109.890 billion yen. In addition to the sneaker shoes boom and bulk purchase by foreign travelers, the warmer winter in 2015 through 2016 than usual years has largely shifted the demands of boots for warming to casual sneakers which increased the sales of multi-purpose shoes. Furthermore, some makers raised their desirable retail prices due to the weaker yen until 2015 having raised the import expenses, which also contributed to the rise of the shipment value. These factors helped the domestic shipment value of multi-purpose shoes (general casual sneakers) to exceed 100 billion yen.

■ **Domestic Shipment of Sports Shoes Market in 2016 Projected to Achieve 104.3 % on Y-o-Y Basis in Volume, or 105.9% in Value.**

Domestic shipment of sports shoes in 2016 is projected to achieve 92,960 thousand pairs, 104.3% of the volume of the year before, or 373.350 billion yen, 105.9% of the value of the preceding year. The continuous booms of sneakers and running are expected to boost the entire sports shoes market.

◆ **Report format:**

Published Report: “Sports Shoes Business 2016”

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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)

	2013		2014		2015		2016 (Forecast)	
		%		%		%		%
Multi-Purpose Shoes (General casual sneakers)	22,940	28.2%	25,720	30.0%	28,080	31.5%	29,690	31.9%
		-		112.1%		109.2%		105.7%
Running shoes	18,460	22.7%	19,360	22.6%	20,820	23.4%	21,220	22.8%
		-		104.9%		107.5%		101.9%
Kids/Infants shoes	6,740	8.3%	7,110	8.3%	7,880	8.8%	9,110	9.8%
		-		105.5%		110.8%		115.6%
Walking shoes	7,150	8.8%	7,860	9.2%	6,990	7.8%	7,100	7.6%
		-		109.9%		88.9%		101.6%
Soccer shoes	6,300	7.8%	6,260	7.3%	6,110	6.9%	6,080	6.5%
		-		99.4%		97.6%		99.5%
Outdoor shoes	5,290	6.5%	5,200	6.1%	5,140	5.8%	5,280	5.7%
		-		98.3%		98.8%		102.7%
Baseball/Softball shoes	2,590	3.2%	2,480	2.9%	2,350	2.6%	2,400	2.6%
		-		95.8%		94.8%		102.1%
Sports sandals	2,250	2.8%	2,320	2.7%	2,250	2.5%	2,350	2.5%
		-		103.1%		97.0%		104.4%
Tennis shoes	1,990	2.4%	1,970	2.3%	1,980	2.2%	2,050	2.2%
		-		99.0%		100.5%		103.5%
Golf shoes	1,880	2.3%	1,650	1.9%	1,680	1.9%	1,740	1.9%
		-		87.8%		101.8%		103.6%
Basketball shoes	1,260	1.6%	1,370	1.6%	1,360	1.5%	1,420	1.5%
		-		108.7%		99.3%		104.4%
Training shoes	1,300	1.6%	1,160	1.4%	1,280	1.4%	1,220	1.3%
		-		89.2%		110.3%		95.3%
Others	3,140	3.9%	3,200	3.7%	3,220	3.6%	3,300	3.5%
		-		101.9%		100.6%		102.5%
Total	81,290	100.0%	85,660	100.0%	89,140	100.0%	92,960	100.0%
		-		105.4%		104.1%		104.3%

Surveyed by Yano Research Institute

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. Part of the market size has been recalculated retroactively.

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

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

	2013		2014		2015		2016 (Forecast)	
		%		%		%		%
Multi-Purpose Shoes (General casual sneakers)	78,140	25.7%	95,430	28.8%	109,890	31.2%	120,120	32.2%
		-		122.1%		115.2%		109.3%
Running shoes	56,610	18.6%	61,570	18.6%	67,410	19.1%	70,780	19.0%
		-		108.8%		109.5%		105.0%
Walking shoes	45,650	15.0%	48,910	14.8%	45,290	12.8%	44,310	11.9%
		-		107.1%		92.6%		97.8%
Outdoor shoes	29,320	9.7%	29,450	8.9%	29,540	8.4%	30,690	8.2%
		-		100.4%		100.3%		103.9%
Soccer shoes	20,440	6.7%	20,760	6.3%	20,950	5.9%	21,720	5.8%
		-		101.6%		100.9%		103.7%
Kids/Infants shoes	14,340	4.7%	15,780	4.8%	18,060	5.1%	21,520	5.8%
		-		110.0%		114.4%		119.2%
Golf shoes	12,080	4.0%	10,960	3.3%	12,330	3.5%	12,800	3.4%
		-		90.7%		112.5%		103.8%
Baseball/Softball shoes	10,400	3.4%	10,340	3.1%	9,760	2.8%	10,230	2.7%
		-		99.4%		94.4%		104.8%
Basketball shoes	7,790	2.6%	8,550	2.6%	8,960	2.5%	9,970	2.7%
		-		109.8%		104.8%		111.3%
Tennis shoes	8,330	2.7%	8,350	2.5%	8,600	2.4%	9,040	2.4%
		-		100.2%		103.0%		105.1%
Training shoes	5,090	1.7%	4,690	1.4%	5,270	1.5%	5,160	1.4%
		-		92.1%		112.4%		97.9%
Sports sandals	2,890	1.0%	3,090	0.9%	3,020	0.9%	3,230	0.9%
		-		106.9%		97.7%		107.0%
Others	12,660	4.2%	12,990	3.9%	13,380	3.8%	13,780	3.7%
		-		102.6%		103.0%		103.0%
Total	303,740	100.0%	330,870	100.0%	352,460	100.0%	373,350	100.0%
		-		108.9%		106.5%		105.9%

Surveyed by Yano Research Institute

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. Part of the market size has been recalculated retroactively.