Yano Research Institute

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RESEARCH SUMMARY

Yano Research Institute Ltd.
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Apparel Market in Japan: Key Research Findings 2016

◆ Research Outline

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

1. Research period: From July to September, 2016
2. Research targets: Apparel manufacturers, retailers (department stores, mass merchandisers, apparel specialty stores and etc.), and related organizations
3. Research methodologies: Face-to-face interviews, mail-in questionnaire survey, and literature research

◆ Key Findings

■ Domestic Apparel Market in 2015 Attained 9,360.9 Billion Yen, 99.8% on Y-o-Y Basis, Slowdown in Women's and Babies & Infants Clothing, While Slight Growth Attained by Men's Clothing

Size of the domestic apparel market in 2015 achieved 9,360.9 billion yen, 99.8% of the size of the previous year, based on the retail amount. The market size by category is as follows: Retail amount of women's clothing attained 5,884.4 billion yen (99.6% of the size of 2014), men's clothing marked 2,558.5 billion yen (100.4%), and babies' and infants' clothing reached 918.0 billion yen (99.5 %). Only men's clothing exceeded the size of the previous year, though slightly.

■ Entire Apparel Retail Market Led by Apparel Specialty Stores and Mail-Order Channels, Despite Stagnant Sales at Department Stores and Mass Merchandisers

The apparel market size by sales channel is as follows: The apparel retail sales at department stores marked 2,060.0 billion yen, 97.1% of the size of the previous year; mass merchandisers down to 924.9 billion yen, 93.7%; apparel specialty stores achieved 4,961.6 billion yen, 101.2%; and other channels including mail orders attained 1,414.4 billion yen, 103.4% of the size of the preceding year. The entire market has been led by the sales at apparel specialty stores and mail orders.

■ Continued Expansion Expected for Online Channel

Among "other" channels, the market of mail orders using catalogues continues to be stagnant, whereas the online shopping market still enjoys prosperity. Due to the various attempts taken by the market players and convenience felt by consumers, the online channel remains to be promising for the future.

◆ Report Format:

Published report: "Apparel Industry 2016"
Issued on: September 23, 2016
Language: Japanese
Format: 481 pages in A4 format
Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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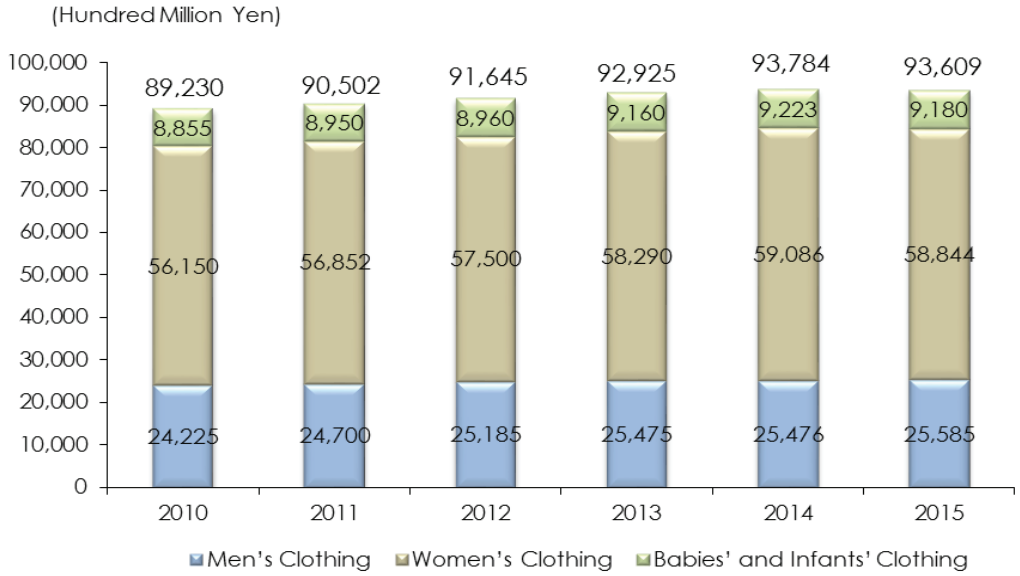
Figure 1. Transition of Entire Domestic Apparel Retail Market Size



Estimated by Yano Research Institute

Notes:

1. The market size is based on the retail amount.

Figure 2. Transition of Entire Domestic Apparel Retail Market Size by Sales Channel

Estimated by Yano Research Institute

Notes:

2. The market size is based on the retail amount.
3. The figures regarding Department Store and Mass Merchandisers were calculated by Yano Research Institute based on “The Dynamic Statistics on Commerce” by METI.

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