

## **Sports Apparel Market in Japan: Key Research Findings 2016**

### ◆ **Research Outline**

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

1. Research period: August to November, 2016
2. Research target: Sports related enterprises (manufacturers, wholesalers, and retailers)
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/email surveys, and in-mail questionnaire

#### **<What is the Sports Apparel Market?>**

The sports apparel market in this research indicates clothing made specially for doing the following 13 categories of sports; training, golf, outdoors, soccer/futsal, lifestyle, baseball/softball, tennis, track & field/running, swimming, ski/snowboard, basketball, fitness, and others. The “others” include sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

#### **<What is the Functional Underwear?>**

The functional underwear in this research indicates compression-support-type undergarments that bring about some level of tightness when wearing them which are expected to provide the following effects to the body: Improvement of athletic abilities, fatigue prevention, support of core body to keep the correct posture, and thermal senses to warm up the body in the cold or cool down in the hot temperature. The functional underwear market is included in the sports apparel market, and is positioned as one of the underwear types in each of the sports categories.

#### **<What are Sports Supporters?>**

The sports supporters in this research indicate those supporters that absorb impacts to the joints and support athletic abilities by wearing them at the time of doing sports or exercises. Taping tapes, supporters for placing on crotches (athletic supporters), and magnetism-used necklaces (or similar products) are not included. Note that this research only targets the brands sold at certain sports goods retailers, so that any products sold at medical facilities, pharmacies, and drugstores are not included.

### ◆ **Key Findings**

#### ■ **Domestic Shipment of Sports Apparel Market in 2016 Projected to Reach 101.0% on Y-o-Y Basis**

The sports apparel market in 2016 is likely to achieve 525.550 billion yen, 101.0% of the size of the previous year, based on the shipment value at manufacturers. Although the sportswear markets of soccer/futsal, baseball/softball, tennis, and ski/snowboards decreased from the previous year, other eight categories are projected to successfully exceed the 2015 results. However, the demand of apparel products are often affected by unseasonable weathers like warm winter, so that belated coldness in the winter may slowdown the sales of winter clothing whose average unit price higher than other seasons, which can lead the total sales in the market to fall short of the expectation.

■ **Training Wear Market in 2016 Likely to Attain 122.3 Billion Yen, 101.0% on Y-o-Y Basis**

The domestic shipment value of training wear in 2016 is projected to attain 122.3 billion yen, 101.0% of the size of the previous year. The shift to place more importance on profits rather than sales values by the makers have come to suppress the shipment volume during the period of 2014 to around 2015, which decreased the ratio of mark down products and raised the unit price of the products sold. Eventually, this is projected to expand the shipment value.

■ **Lifestyle Wear Market in 2016 Manages Positive Growth, Driven by Sales of High-Ranking Brands**

The domestic lifestyle wear market in 2016 is projected to achieve 42.2 billion yen, 102.9% of the size of the previous year, based on the shipment value at manufacturers. The popularity of so called “sports-mix coordination” for the past few years, which is to coordinate some items of sports brands into the casual clothing, has expanded the volume of leading sports-brand items treated at select shops. Such tendency continued in 2016 to expand the shipment. However, the casual wear fashion changes quickly so that some parties concerned say that the trend is likely to lose the momentum by the latter half of 2016.

◆ **Report Format:**

Published report: “Sports Apparel Market 2017”

Issued on: November 30, 2016

Language: Japanese

Format: 579 pages in A4 format

Price: 145,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Table 1: Transition of Size of Domestic Sports Apparel Market by Category**

(Left: Million yen; Right above: Composition rate, Right below: Y-on-Y)

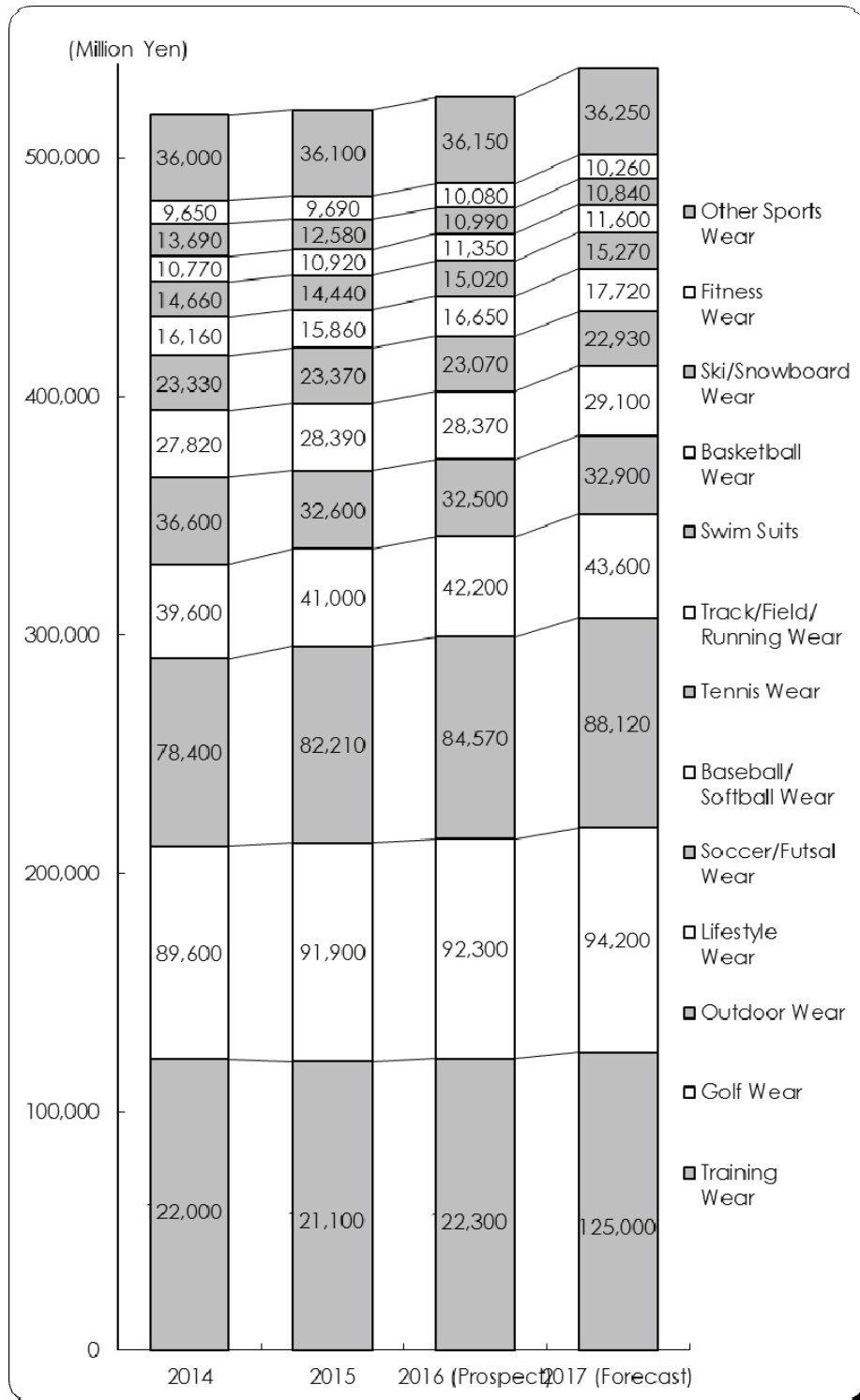
|                           | 2014    |        | 2015    |        | 2016 (Prospect) |        | 2017 (Forecast) |        |
|---------------------------|---------|--------|---------|--------|-----------------|--------|-----------------|--------|
|                           |         | %      |         | %      |                 | %      |                 | %      |
| TrainingWear              | 122,000 | 23.5%  | 121,100 | 23.3%  | 122,300         | 23.3%  | 125,000         | 23.2%  |
|                           |         | -      |         | 99.3%  |                 | 101.0% |                 | 102.2% |
| Golf Wear                 | 89,600  | 17.3%  | 91,900  | 17.7%  | 92,300          | 17.6%  | 94,200          | 17.5%  |
|                           |         | -      |         | 102.6% |                 | 100.4% |                 | 102.1% |
| Outdoor Wear              | 78,400  | 15.1%  | 82,210  | 15.8%  | 84,570          | 16.1%  | 88,120          | 16.4%  |
|                           |         | -      |         | 104.9% |                 | 102.9% |                 | 104.2% |
| Lifestyle Wear            | 39,600  | 7.6%   | 41,000  | 7.9%   | 42,200          | 8.0%   | 43,600          | 8.1%   |
|                           |         | -      |         | 103.5% |                 | 102.9% |                 | 103.3% |
| Soccer/Futsal Wear        | 36,600  | 7.1%   | 32,600  | 6.3%   | 32,500          | 6.2%   | 32,900          | 6.1%   |
|                           |         | -      |         | 89.1%  |                 | 99.7%  |                 | 101.2% |
| Baseball/ Softball Wear   | 27,820  | 5.4%   | 28,390  | 5.5%   | 28,370          | 5.4%   | 29,100          | 5.4%   |
|                           |         | -      |         | 102.0% |                 | 99.9%  |                 | 102.6% |
| Tennis Wear               | 23,330  | 4.5%   | 23,370  | 4.5%   | 23,070          | 4.4%   | 22,930          | 4.3%   |
|                           |         | -      |         | 100.2% |                 | 98.7%  |                 | 99.4%  |
| Track/Field/ Running Wear | 16,160  | 3.1%   | 15,860  | 3.0%   | 16,650          | 3.2%   | 17,720          | 3.3%   |
|                           |         | -      |         | 98.1%  |                 | 105.0% |                 | 106.4% |
| Swim Suits                | 14,660  | 2.8%   | 14,440  | 2.8%   | 15,020          | 2.9%   | 15,270          | 2.8%   |
|                           |         | -      |         | 98.5%  |                 | 104.0% |                 | 101.7% |
| Basketball Wear           | 10,770  | 2.1%   | 10,920  | 2.1%   | 11,350          | 2.2%   | 11,600          | 2.2%   |
|                           |         | -      |         | 101.4% |                 | 103.9% |                 | 102.2% |
| Ski/Snowboard Wear        | 13,690  | 2.6%   | 12,580  | 2.4%   | 10,990          | 2.1%   | 10,840          | 2.0%   |
|                           |         | -      |         | 91.9%  |                 | 87.4%  |                 | 98.6%  |
| Fitness Wear              | 9,650   | 1.9%   | 9,690   | 1.9%   | 10,080          | 1.9%   | 10,260          | 1.9%   |
|                           |         | -      |         | 100.4% |                 | 104.0% |                 | 101.8% |
| Other Sports Wear         | 36,000  | 6.9%   | 36,100  | 6.9%   | 36,150          | 6.9%   | 36,250          | 6.7%   |
|                           |         | -      |         | 100.3% |                 | 100.1% |                 | 100.3% |
| Total                     | 518,280 | 100.0% | 520,160 | 100.0% | 525,550         | 100.0% | 537,790         | 100.0% |
|                           |         | -      |         | 100.4% |                 | 101.0% |                 | 102.3% |

Survey by Yano Research Institute

Notes:

1. The market size is based on the shipment value of manufacturers.
2. "Other Sports Wear" includes sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.
3. Some values may not match, for the figures are rounded.

■ **Figure 1: Transition of Shipment volume of Domestic Sports Apparel Market by Category**

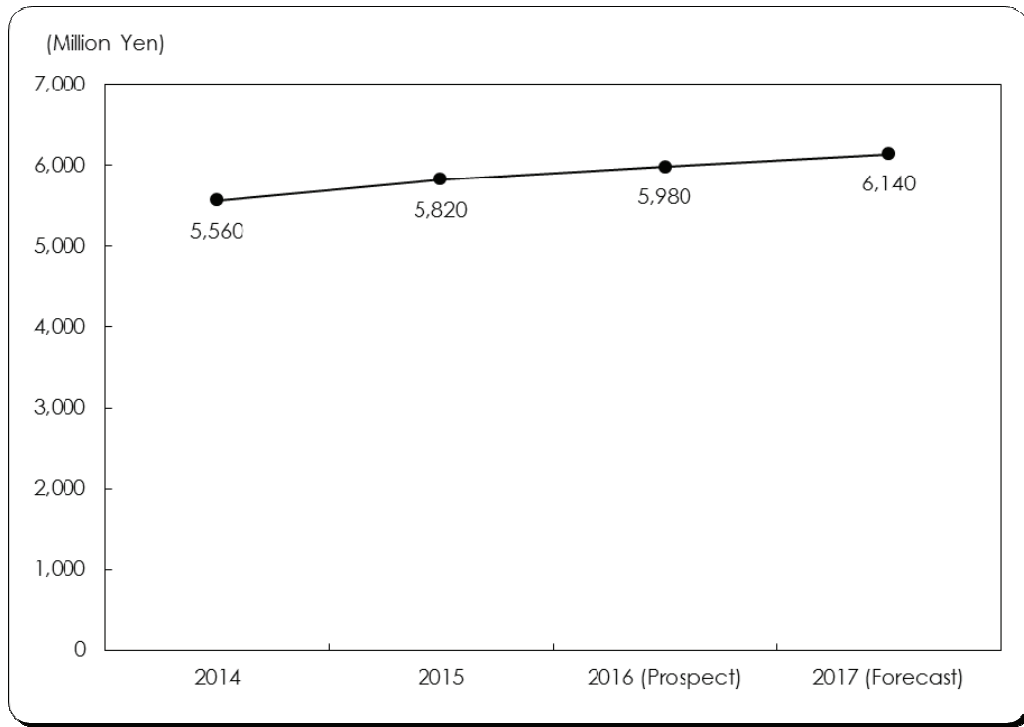


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Notes:

- The market size is based on the shipment value of manufacturers.
- “Other Sports Wear” includes sportswear for volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

■ **Figure 2: Transition of Size of Sports Supporters/Belts Market**



Survey by Yano Research Institute

Notes:

6. The market size is based on the shipment value of manufacturers.
7. This research only targets the brands and products sold at certain sports goods retailers, so that any products sold at medical facilities, pharmacies and drugstores are not included.