

Shoes and Footwear Market in Japan: Key Research Findings 2016

◆ Research Outline

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

1. Research period: September to December, 2016
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, and literature research using statistic data from government ministries and agencies, and related organizations.

<What are Shoes and Footwear?>

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

◆ Key Findings

■ Shoes and Footwear Retail Market in FY2015 Attained 1,415.0 Billion Yen, 100.8% on Y-o-Y Basis

Size of the FY2015 domestic shoes and footwear retail market attained 1,415 billion yen, 100.8% of that of the previous fiscal year. In spite of men’s and women’ shoes failing to reach the previous-fiscal-year results, the favorable sales of sport shoes and children’s shoes have driven the entire market size, especially because the sports shoes, the category of which occupying 40% of the entire market, have attained the positive growth for four years in a row due to the recent sneaker boom.

■ FY2016 Domestic Shoes and Footwear Market Expected to Scale Down to 1,390 Billion Yen, 98.2% on Y-o-Y Basis, Whereas Sports Shoes Managed to Attain 103.7% on Y-o-Y Basis

The domestic shoes and footwear retail market in FY2016 is projected to scale down to 1,390 billion yen, 98.2% of the size of the previous fiscal year. The decreased demand from foreign visitors and declining sales tendency of men’s and women’ shoes are likely to shift the market to negative growth. On the other hand, however, the sports shoes market is likely to keep being on the rise to attain 643.0 billion yen, 103.7% on year-over-year basis, due to steadfast demand of casual sneakers, though the growth rate of the market may somewhat slow down.

◆ Report Format:

Published report: “Shoes and Footwear Industry 2017”

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Language: Japanese

Format: 335 pages in A4 format

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

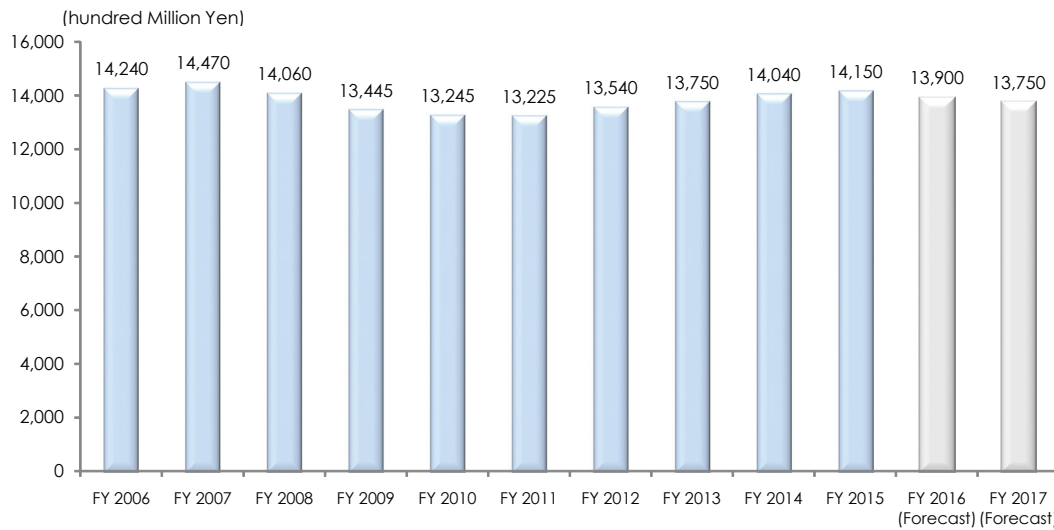
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■ **Figure and Table 1: Transition of Size of Shoes and Footwear Retail Market**



(Hundred Million Yen)

	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016 (Forecast)	FY 2017 (Forecast)
Shoes and Footwear Retail Market Size	14,240	14,470	14,060	13,445	13,245	13,225	13,540	13,750	14,040	14,150	13,900	13,750
Y-o-Y Comparison	102.2%	101.6%	97.2%	95.6%	98.5%	99.8%	102.4%	101.6%	102.1%	100.8%	98.2%	98.9%

Calculated by Yano Research Institute

Note:

1. The market size is based on retail values.

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

(Hundred Million Yen)

	FY 2011		FY 2012		FY 2013		FY 2014		FY 2015		FY 2016 (Forecast)		FY 2017 (Forecast)	
	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	2,190	97.3%	2,240	102.3%	2,280	101.8%	2,260	99.1%	2,220	98.2%	2,050	92.3%	1,950	95.1%
		16.6%		16.5%		16.6%		16.1%		15.7%		14.7%		14.2%
Women's Shoes	3,650	99.5%	3,730	102.2%	3,690	98.9%	3,630	98.4%	3,500	96.4%	3,190	91.1%	3,000	94.0%
		27.6%		27.5%		26.8%		25.9%		24.7%		22.9%		21.8%
Sports Shoes	5,040	101.1%	5,250	104.2%	5,500	104.8%	5,900	107.3%	6,200	105.1%	6,430	103.7%	6,600	102.6%
		38.1%		38.8%		40.0%		42.0%		43.8%		46.3%		48.0%
Baby/Infant's Shoes	880	98.9%	870	98.9%	860	98.9%	860	100.0%	880	102.3%	900	102.3%	920	102.2%
		6.7%		6.4%		6.3%		6.1%		6.2%		6.5%		6.7%
Others	1,465	101.0%	1,450	99.0%	1,420	97.9%	1,390	97.9%	1,350	97.1%	1,330	98.5%	1,280	96.2%
		11.1%		10.7%		10.3%		9.9%		9.5%		9.6%		9.3%
Shoes/Footwear Market Size	13,225	99.8%	13,540	102.4%	13,750	101.6%	14,040	102.1%	14,150	100.8%	13,900	98.2%	13,750	98.9%
		100.0%		100.0%		100.0%		100.0%		100.0%		100.0%		100.0%

Calculated by Yano Research Institute

Notes:

2. Market sizes are based on retail values.
3. "Others" include boots, work shoes and etc.