

## Sporting Goods Market in Japan: Key Research Findings 2017

### ◆ Research Outline

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

1. Research period: From January to March 2017
2. Research targets: Sporting goods manufacturers, importers, wholesalers, and retailers
3. Research methodologies: Face-to-face interviews, and mail-in questionnaire

#### What is the sporting goods market in this survey?

The sporting goods market in this survey is the market of equipment and goods used in the following 18 sports categories: Golf, Ski/Snowboard, Fishing, Athletic wear, Outdoor, Sports shoes, Tennis, Swimming, Baseball/Softball, Bicycle sports, Badminton, Martial arts, Table tennis, Fitness, Soccer/Futsal, Basketball, Volleyball and Rugby. The market size is calculated based on the shipment value (domestic shipment) of manufacturers.

Among the categories shown above, “Athletic wear” includes training wear, lifestyle wear (casual wear), running and other athletics wear. “Sports shoes” include running, walking, multi-purpose shoes (including casual shoes), kids’ shoes, and sports sandals.

### ◆ Key Findings

#### ■ Domestic Sporting Goods Market in 2016 Expected to Attain 101.9% on Y-o-Y Basis

The domestic sporting goods market in 2016 is likely to attain 1,418.690 billion yen, 101.9% of the size of the previous year, based on the shipment value of manufacturers. With 14 categories out of 18 showed positive growth, the market as a whole has enjoyed being steady.

#### ■ Sports Shoes Market in 2016, Occupying About 20% of Entire Sporting Goods Market, Attained Highest Growth Rate Out of 18 Categories, with 106.7% On Y-o-Y Basis

The projected market size of domestic sports shoes in 2016 is regarded to reach 260.1 billion yen, 106.7% of the size of the preceding year. Although the growth rate has slowed down because inbound tourism demand that had once overheated has quietened down, both the sneakers and running booms are likely to arouse eagerness of consumers, which would contribute to maintain the positive market growth.

#### ■ Domestic Sporting Goods Market in 2017 Projected to be 102.6% on Y-o-Y Basis

The domestic sporting goods market in 2017 is projected to achieve 1,455.55 billion yen, 102.6% of the size of the preceding year based on the shipment value of manufacturers. In 2017, not only the exchange rate tending toward weaker yen to increase inbound tourism demand, but also the running boom still continues to ensure future robustness of the domestic sporting goods market.

### ◆ Report Format:

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■ **Table 1. Transition of Domestic Sporting Goods Market by Category**

Million Yen, Upper level: composition ratio (%), Lower level: Y-o-Y

Category/Year	2012		2013		2014		2015		2016 (Prospect)		2017 (Forecast)	
		%		%		%		%		%		%
Golf	251,420	19.8	262,960	20.0	251,030	18.6	259,250	18.6	256,380	18.1	261,680	18.0
		-		104.6		95.5		103.3		98.9		102.1
Ski/Snowboard	51,980	4.1	52,590	4.0	52,010	3.9	49,770	3.6	43,980	3.1	40,130	2.8
		-		101.2		98.9		95.7		88.4		91.2
Fishing	115,340	9.1	121,070	9.2	123,850	9.2	127,530	9.2	130,540	9.2	134,470	9.2
		-		105.0		102.3		103.0		102.4		103.0
Athletic Wear	172,370	13.6	175,130	13.3	177,760	13.2	177,960	12.8	181,150	12.8	186,320	12.8
		-		101.6		101.5		100.1		101.8		102.9
Outdoor	163,670	12.9	174,190	13.2	179,660	13.3	190,960	13.7	199,280	14.0	205,600	14.1
		-		106.4		103.1		106.3		104.4		103.2
Sports Shoes	185,910	14.7	197,630	15.0	224,780	16.6	243,670	17.5	260,100	18.3	271,310	18.6
		-		106.3		113.7		108.4		106.7		104.3
Tennis	55,170	4.4	55,570	4.2	54,230	4.0	56,200	4.0	56,580	4.0	58,630	4.0
		-		100.7		97.6		103.6		100.7		103.6
Swimming	21,810	1.7	22,190	1.7	22,280	1.6	21,700	1.6	22,150	1.6	22,310	1.5
		-		101.7		100.4		97.4		102.1		100.7
Baseball/Softball	72,880	5.7	74,260	5.6	73,650	5.5	72,610	5.2	72,910	5.1	73,830	5.1
		-		101.9		99.2		98.6		100.4		101.3
Bicycle Sports	32,450	2.6	32,280	2.5	37,180	2.8	40,400	2.9	39,530	2.8	42,460	2.9
		-		99.5		115.2		108.7		97.8		107.4
Badminton	11,840	0.9	12,580	1.0	13,330	1.0	14,550	1.0	15,280	1.1	15,480	1.1
		-		106.3		106.0		109.2		105.0		101.3
Martial Arts	12,700	1.0	12,200	0.9	11,850	0.9	11,730	0.8	11,740	0.8	11,770	0.8
		-		96.1		97.1		99.0		100.1		100.3
Table Tennis	9,790	0.8	11,120	0.8	11,470	0.8	12,150	0.9	12,630	0.9	13,250	0.9
		-		113.6		103.1		105.9		104.0		104.9
Fitness	15,530	1.2	14,540	1.1	14,340	1.1	14,960	1.1	15,440	1.1	15,960	1.1
		-		93.6		98.6		104.3		103.2		103.4
Soccer/Futsal	61,800	4.9	62,840	4.8	66,640	4.9	62,320	4.5	62,610	4.4	63,150	4.3
		-		101.7		106.0		93.5		100.5		100.9
Basketball	20,780	1.6	21,900	1.7	23,610	1.7	23,710	1.7	25,300	1.8	25,900	1.8
		-		105.4		107.8		100.4		106.7		102.4
Volleyball	10,380	0.8	10,170	0.8	10,200	0.8	10,170	0.7	10,040	0.7	10,230	0.7
		-		98.0		100.3		99.7		98.7		101.9
Rugby	2,260	0.2	2,360	0.2	2,750	0.2	2,900	0.2	3,050	0.2	3,070	0.2
		-		104.4		116.5		105.5		105.2		100.7
Sporting Goods Market Total	1,268,080	100.0	1,315,580	100.0	1,350,620	100.0	1,392,540	100.0	1,418,690	100.0	1,455,550	100.0
		-		103.7		102.7		103.1		101.9		102.6

Estimated by Yano Research Institute

Notes:

1. The market size is based on the shipment value (domestic shipment) of manufacturers.
2. "Athletic wear" includes training wear, lifestyle wear, running and other athletics wear. "Sports shoes" include running, walking, multi-purpose shoes (including casual shoes), kids' shoes, and sports sandals. Those sporting goods that are related with each of the sports such as golf wear and soccer cleats are included in the respective category of sports.