

**RESEARCH SUMMARY**

**Yano Research Institute Ltd.**  
2-46-2 Honcho, Nakano-ku,  
Tokyo 164-8620, Japan

***Research on the Sporting Goods Industry in Japan for 2009***

➤ **Research Outline**

**Yano Research Institute has conducted a research on the sporting goods market in Japan with following conditions.**

1. Research period: November 2008 to February 2009
2. Research targets: 450 major Japanese companies dealing with sporting goods, including manufacturers, wholesalers, importers and retailers
3. Face-to-face interviews with relevant personnel and questionnaire survey by post were primarily employed.

**<What is the sporting goods market in this survey?>**

The sporting goods market in this survey consists of equipment and goods of the following 16 categories;

Golf, Ski, Fishing, Athletic wear, Outdoor, Sports shoes, Tennis, Swimming, Baseball & Softball, Marine sports, Snowboard, Cycle sports, Badminton, Martial art, Table tennis and Fitness

➤ **Key Findings**

◆ **Domestic sporting goods market in 2008 expected to achieve positive growth of 101.9% year-on-year**

The scale of sporting goods market (manufacturers' shipment basis) in Japan in 2008 is projected to be 1,276 billion and 310 million yen, 101.9% of the previous year.

◆ **Cycle sports goods market sharply grown backed by the health trend**

In 2008, the cycle sports goods market most significantly expanded its scale from 2007 among all categories of the sporting goods market. The cycle sports goods market in 2008 is projected to be 28.5 billion yen, 123.8% of the year before, due mainly to the increase of beginners who had been encouraged by the key words of "Kenko (Health)", "Kankyo (Environment)" and "Keizaisei (Economy)", which cycle sports are good for.

◆ **The increased participants to individual sports made the market to be on a growing trend**

Such individual sports as running, cycle sports, walking and light trekking are currently very popular in Japan due mainly to the economic efficiency of these sports (i.e. "Not much money is required to do these sports") that met the money saving trend of consumers, in addition to low entry barriers (i.e. "It is easy to participate on a personal basis" (or, "It is possible to continue these sports at one's own pace") and "It can be started relatively casually"), with the main premise that "It is possible to enjoy good health by doing these sports". The trend is expected to continue also in 2009 and the market size in 2009 is forecasted to be 1,295 billion and 990 million yen (manufacturers' shipment amount basis), which is 101.5% of the value in 2008.

➤ **Report format:**

Published report: "Sporting Goods Industry 2009 (with CD-ROM)"

Issued in: March 2009

Language: Japanese

Format: 675 pages in A4 format

Price: 155,000 yen (7,750 yen of consumption tax will be additionally charged for sales in Japan.)

**Contacts:**

Public Relations

**Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)**

Phone: +81-3-5371-6912

E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

➤ **Research Summary:**

- 1. The projected market size in 2008 of the total sporting goods market in Japan (manufacturers' shipment basis) is 1,276 billion and 310 million yen, 101.9% of the year before.**

**1-1 Golf**

Demand for such major items of as "wood clubs" and "iron clubs" dropped sharply and the market size in 2008 is estimated to be 255 billion and 320 million yen, 98.8% year-on-year.

**1-2 Ski**

The market scale in 2008 is projected to be 28.2 billion yen, or 95.4% year-on-year, against the backdrop of the diversification of consumers' leisure activities which might have prevented increase of new participants.

**1-3 Fishing**

The market growth brought by the manufacturers' raised prices applied since 2007 due to the material cost increase did not realize for the second consecutive year in 2008 and the market scale is estimated to be 123 billion and 380 million yen, 98.8% of the year before.

**1-4 Athletic wear**

The market size in 2008 is estimated to be 232.8 billion yen, a positive growth of 104.7% year-on-year, thanks to the continuously strong training wear sales that account for approx. 75% of the total athletic wear market.

**1-5 Outdoor**

The market in 2008 is projected to be 129 billion and 230 million yen, 104.0% of the previous year, due to the strong needs for daily use of outdoor clothing, shoes and backpacks, which account for combined ratio of approx. 70% of the outdoor goods market..

**1-6 Sports shoes**

Mainly in the category of multi-purpose shoes (casual shoes for general use), manufacturers supplied too many products that exceed real demand. The market in 2008 is expected to be 205 billion and 860 million yen, 104.3% year-on-year.

**1-7 Tennis**

The market in 2008 is projected to be 60 billion and 120 million yen, which is 98.3% of the previous year, due to sluggish sales of new products and increase of bargain products in addition to decrease in player numbers.

### **1-8 Swim**

The market was lead and activated by new race type swimming wear introduced by each manufacture and “LZR RACER®” deployed under SPEEDO brand attracted tremendous interests in 2008. Consequently, the market is expected to grow to 104.9% of the previous year, which is 26.7 billion yen in value.

### **1-9 Baseball/ Softball**

Many hot topics including introduction of playoff games for professional baseball in Japan, transfers of popular Japanese baseball players to Major League in U.S., popularity of the high school baseball tournament and the Beijing Olympic Games stimulated the market, the size of which is estimated to be 77 billion and 220 million yen, 100.2% of the previous year.

### **1-10 Snowboard**

The market in 2008 is estimated to shrink to 30.4 billion yen, or 98.1% of the previous year, due to the decrease of active snowboarders including decrease of new participants as a result of diversification of leisure activities and increase of dormant snowboarders caused by the changes in lifestyle of existing snowboarders.

### **1-11 Cycle sports**

The number of new participants has been increasing at an accelerating pace backed by the so-called “New 3 Ks” representing the key words of “Kenko (Health)”, ”Kankyo (Environment)” and ”Keizaisei (Economy)”, which promoted the growth of the market that is expected to be 28.5 billion yen in 2008, 123.8% of the year before.

### **1-12 Badminton**

The market in 2008 is expected to be 103.8% of the previous year, or 13 billion and 690 million yen, due to the strong replacement demand and the excellent performance of Japanese players in Beijing Olympic Games in addition to the increasing trend of the player numbers.

## **2. Prospects of the market**

The current economic climate surrounding Japanese economy is casting a shadow on the sporting goods market as well that is on the growing trend on one hand. On the other hand, there is another trend that such individual sports as running, cycle sports, walking and trekking have been acquiring new participants due to low entry barriers, which has vitalized respective markets. The increased participation to these individual sports by general public is expected to help the sporting goods market to continuously show a growing trend, and consequently, the market size in 2009 is forecasted to be 1,295 billion and 990 million yen (manufacturers' shipment amount basis), which is 101.5% of the value in 2008.

## 【 Market Size of Sporting Goods in Japan by Category (SHIPMENT value basis) 】

Units: Mil. Yen, % (Upper row : Market share, Lower row : Year-on-year ratio)

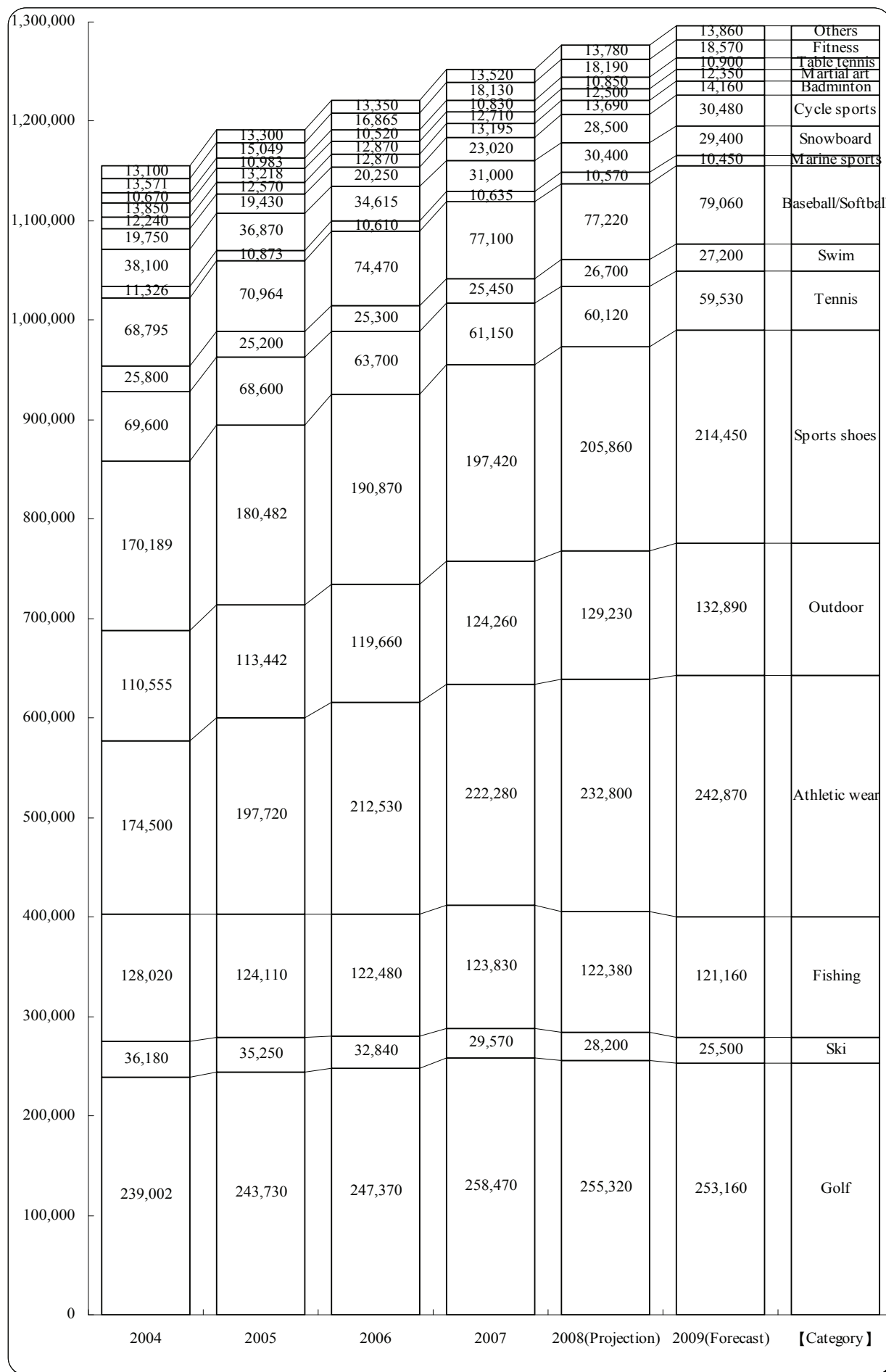
	2004		2005		2006		2007		2008(Projection)		2009(Forecast)	
		%		%		%		%		%		%
Golf	239,002	20.7	243,730	20.5	247,370	20.3	258,470	20.6	255,320	20.0	253,160	19.5
		-		102.0		101.5		104.5		98.8		99.2
Ski	36,180	3.1	35,250	3.0	32,840	2.7	29,570	2.4	28,200	2.2	25,500	2.0
		-		97.4		93.2		90.0		95.4		90.4
Fishing	128,020	11.1	124,110	10.4	122,480	10.0	123,830	9.9	122,380	9.6	121,160	9.3
		-		96.9		98.7		101.1		98.8		99.0
Athletic wear	174,500	15.1	197,720	16.6	212,530	17.4	222,280	17.7	232,800	18.2	242,870	18.7
		-		113.3		107.5		104.6		104.7		104.3
Outdoor	110,555	9.6	113,442	9.5	119,660	9.8	124,260	9.9	129,230	10.1	132,890	10.3
		-		102.6		105.5		103.8		104.0		102.8
Sports shoes	170,189	14.7	180,482	15.1	190,870	15.6	197,420	15.8	205,860	16.1	214,450	16.5
		-		106.0		105.8		103.4		104.3		104.2
Tennis	69,600	6.0	68,600	5.8	63,700	5.2	61,150	4.9	60,120	4.7	59,530	4.6
		-		98.6		92.9		96.0		98.3		99.0
Swim	25,800	2.2	25,200	2.1	25,300	2.1	25,450	2.0	26,700	2.1	27,200	2.1
		-		97.7		100.4		100.6		104.9		101.9
Baseball/Softball	68,795	6.0	70,964	6.0	74,470	6.1	77,100	6.2	77,220	6.1	79,060	6.1
		-		103.2		104.9		103.5		100.2		102.4
Marine sports	11,326	1.0	10,873	0.9	10,610	0.9	10,635	0.8	10,570	0.8	10,450	0.8
		-		96.0		97.6		100.2		99.4		98.9
Snowboard	38,100	3.3	36,870	3.1	34,615	2.8	31,000	2.5	30,400	2.4	29,400	2.3
		-		96.8		93.9		89.6		98.1		96.7
Cycle sports	19,750	1.7	19,430	1.6	20,250	1.7	23,020	1.8	28,500	2.2	30,480	2.4
		-		98.4		104.2		113.7		123.8		106.9
Badminton	12,240	1.1	12,570	1.1	12,870	1.1	13,195	1.1	13,690	1.1	14,160	1.1
		-		102.7		102.4		102.5		103.8		103.4
Martial art	13,850	1.2	13,218	1.1	12,870	1.1	12,710	1.0	12,500	1.0	12,350	1.0
		-		95.4		97.4		98.8		98.3		98.8
Table tennis	10,670	0.9	10,983	0.9	10,520	0.9	10,830	0.9	10,850	0.9	10,900	0.8
		-		102.9		95.8		102.9		100.2		100.5
Fitness	13,571	1.2	15,049	1.3	16,865	1.4	18,130	1.4	18,190	1.4	18,570	1.4
		-		110.9		112.1		107.5		100.3		102.1
Others	13,100	1.1	13,300	1.1	13,350	1.1	13,520	1.1	13,780	1.1	13,860	1.1
		-		101.5		100.4		101.3		101.9		100.6
Total	1,155,248	100.0	1,191,791	100.0	1,221,170	100.0	1,252,570	100.0	1,276,310	100.0	1,295,990	100.0
		-		103.2		102.5		102.6		101.9		101.5

\*The above numbers (including those for 2007 or before) are based on the research and the calculation newly conducted during the research period of this report (Nov. 2008-Feb. 2009)

Estimated by Yano Research Institute Ltd.

**【Market Size of Sporting Goods in Japan by Category (SHIPMENT value basis)】**

(Unit: Mil. Yen)



**【Percentage Breakdown of the Sporting Goods Market in Japan by Category (SHIPMENT value basis)】**

(Unit: %)

