

Fashion E-commerce Industry in Japan: Key Research Findings 2010

➤ **Research Outline**

Yano Research Institute has conducted a study on the fashion e-commerce industry in Japan with following conditions.

1. Research period: August to October 2010
2. Research targets: Brand holders, e-commerce development supporting companies and cross-channel service companies, etc.
3. Research methodologies: Face-to-face interviews, telephone and email surveys, literature research

DEFINITION of Fashion EC

The market size of the fashion EC or e-commerce in this study was calculated based on the retail sales value of e-commerce products in the categories of clothing, clothing accessories, shoes, bags, leather goods, jewelry, watches, fashion accessories, interior goods, sundries, furniture, chinaware and glassware.

➤ **Key Findings**

◆ **The FY 09 market size of fashion EC grew by 6% year-on-year to JPY 439.0 billion.**

The fiscal 2009 market size of fashion EC showed healthy growth and is estimated at 439.0 billion yen, up 6 percent from the previous year. Some positive factors that contributed to the market expansion include the establishment of e-commerce as a necessary channel for fashion goods, the further reinforcement of e-commerce business of each company and the expansion of fashion mall type e-commerce such as ZOZOTOWN which began TV commercials.

◆ **Brand holders position their proprietary EC as the one to work effectively in association with real stores.**

A proprietary e-commerce website has an important tool for brand holders to offer a variety of functions, including the effective use in association with real stores, not just limited for the purpose of sales increase. Establishing an e-commerce website is considered to become essential for brand companies, including luxury brand companies.

◆ **The FY 10 market size of fashion EC is expected to increase steadily to JPY 465.2 billion.**

The fiscal 2010 market size of fashion EC is anticipated to be 465.2 billion yen, up 6 percent from the previous year. The growth rate would be flat, while the market size is expected to grow steadily. Development of e-commerce by related companies will further increase.

➤ **Report format:**

Published report: "Internet Strategies of Brand Business 2010" Issued in: October 28, 2010

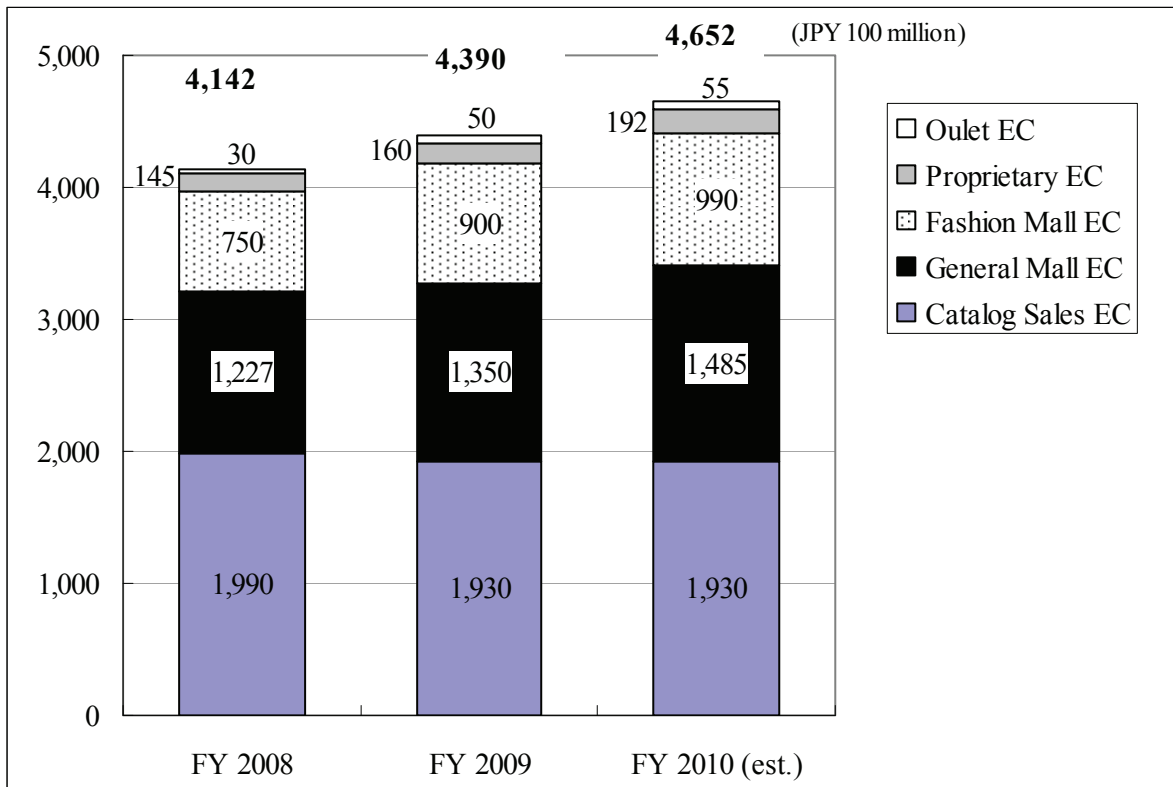
Language: Japanese Format: 292 pages in B5 format

Price: 120,000 yen (6,000 yen of consumption tax will be additionally charged for sales in Japan.)

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[Market Size of Fashion EC]



Estimated by Yano Research Institute Ltd.

Note:

- Based on retail sales value.
- Fashion EC shop types:

Proprietary EC ... E-commerce that is directly managed by brand company

Fashion mall EC ... Online mall that collects various fashion brand companies, such as ZOZOTOWN

General mall EC ... General online mall, such as Rakuten

Outlet EC ... Online mall that collects outlet products, such as GILT, which is an invitation family sale site

Catalog sales EC ... E-commerce that is operated by catalog sales companies, such as Nissen and Bellemaison