

Sports Shoes Market in Japan: Key Research Findings 2011

◆ **Research Outline**

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

1. Research period: From May to August, 2011
2. Research targets: 200 leading companies from sports shoes manufacturers, import traders, wholesalers, retailers
3. Research methodologies: Face-to-face interviews, and mail-in survey

What is sports shoes market?

Sports shoes in this research are the products that sporting goods manufacturers and shoes manufacturers have shipped as “sports shoes.” 14 categories of such products were targeted to calculate the shipment volume and value. Since market categorization and definition have reviewed this year, some results, such as entire size of the market, may not coincide with the past figures.

What are toning shoes?

Toning shoes are shoes that have effects of making lower part of the body (hips, thighs, calves, etc) firm by wearing them. Some of them are said to burn more calories for diet purpose or have exercising effect. This research also targeted those products that are expected to have above-mentioned effects or expected to pursue firm and beautiful legs even if they are not particularly defined as “toning shoes.” Note that this article only refers to toning shoes developed by sports shoes makers.

◆ **Key Findings**

- **Shipment of domestic sports shoes market in FY2010 was 101.1 % of the previous year in volume, or 101.0% in value**

There were 78.05 million pairs of sports shoes shipped domestically in 2010 which is 101.1% of growth by year-over-year basis, or 101.0 % in value at 176.74 billion yen.

Although “multipurpose shoes,” the largest category has declined, the rise of those categories of “running shoes,” “walking shoes,” and “out-door shoes” has driven the entire sports shoes market to a slight increase.

- **Toning shoes boom has boosted the shipment of domestic walking shoes market in 2010 to remarkable 120.3% of growth in volume and 117.0 % in value**

Domestic walking shoes market in 2010 largely increased both in volume and in value. It shipped 6.92 million pairs, marking 120.3% of previous year, or 117.0 % in value at 43.18 billion yen.

An unprecedented boom of toning shoes with their expected effect of bringing about “beautiful legs” by just wearing them contributed in double-digit growth in walking shoes market.

◆ **Report format:**

Published report: “Sports Shoes Industry 2011”

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Transition of domestic shipment volume on domestic sports shoes

Unit: thousand pairs, upper level: composition ratio, lower level: year-to-year comparison

	2008		2009		2010		2011(forecast)	
		%		%		%		%
Multipurpose shoes	22,480	29.4%	23,100	29.9%	22,020	28.2%	21,910	27.8%
		-		102.8%		95.3%		99.5%
Running shoes	14,430	18.8%	15,480	20.1%	17,140	22.0%	17,630	22.3%
		-		107.3%		110.7%		102.9%
Walking shoes	5,540	7.2%	5,750	7.5%	6,920	8.9%	7,630	9.7%
		-		103.8%		120.3%		110.3%
Shoes for kids/infants	7,550	9.9%	7,750	10.0%	6,700	8.6%	6,510	8.3%
		-		102.6%		86.5%		97.2%
Soccer shoes	6,390	8.3%	5,985	7.8%	6,025	7.7%	5,970	7.6%
		-		93.7%		100.7%		99.1%
Outdoor shoes	4,160	5.4%	4,400	5.7%	4,700	6.0%	5,020	6.4%
		-		105.8%		106.8%		106.8%
Sandals	4,160	5.4%	3,100	4.0%	2,520	3.2%	2,390	3.0%
		-		74.5%		81.3%		94.8%
Baseball and softball shoes	2,250	2.9%	2,420	3.1%	2,430	3.1%	2,460	3.1%
		-		107.6%		100.4%		101.2%
Tennis shoes	2,090	2.7%	2,065	2.7%	2,025	2.6%	2,010	2.5%
		-		98.8%		98.1%		99.3%
Training shoes	1,620	2.1%	1,330	1.7%	1,870	2.4%	1,910	2.4%
		-		82.1%		140.6%		102.1%
Golf shoes	1,770	2.3%	1,770	2.3%	1,720	2.2%	1,560	2.0%
		-		100.0%		97.2%		90.7%
Basketball shoes	1,160	1.5%	1,135	1.5%	1,075	1.4%	1,040	1.3%
		-		97.8%		94.7%		96.7%
Volleyball shoes	610	0.8%	580	0.8%	570	0.7%	565	0.7%
		-		95.1%		98.3%		99.1%
Others	2,350	3.1%	2,305	3.0%	2,335	3.0%	2,285	2.9%
		-		98.1%		101.3%		97.9%
Total	76,560	100.0%	77,170	100.0%	78,050	100.0%	78,890	100.0%
		-		100.8%		101.1%		101.1%

Transition of domestic shipment amount on domestic sports shoes

Unit: million yen, upper level: composition ratio, lower level: year-to-year comparison

	2008		2009		2010		2011 (Forecast)	
		%		%		%		%
Multipurpose shoes	79,310	28.5%	78,240	28.6%	72,800	26.3%	72,410	25.5%
		-		98.7%		93.0%		99.5%
Running shoes	41,040	14.8%	42,890	15.7%	46,480	16.8%	48,750	17.2%
		-		104.5%		108.4%		104.9%
Walking shoes	36,050	13.0%	36,910	13.5%	43,180	15.6%	47,310	16.7%
		-		102.4%		117.0%		109.6%
Outdoor shoes	22,220	8.0%	23,010	8.4%	24,780	9.0%	26,850	9.5%
		-		103.6%		107.7%		108.4%
Succor shoes	21,710	7.8%	18,890	6.9%	18,610	6.7%	18,440	6.5%
		-		87.0%		98.5%		99.1%
Shoes for kids/infants	16,710	6.0%	16,350	6.0%	13,910	5.0%	13,580	4.8%
		-		97.8%		85.1%		97.6%
Golf shoes	11,730	4.2%	11,480	4.2%	10,600	3.8%	10,060	3.5%
		-		97.9%		92.3%		94.9%
Baseball /Softball shoes	9,770	3.5%	10,510	3.8%	10,180	3.7%	10,310	3.6%
		-		107.6%		96.9%		101.3%
Tennis shoes	8,360	3.0%	8,225	3.0%	8,020	2.9%	7,870	2.8%
		-		98.4%		97.5%		98.1%
Training shoes	6,020	2.2%	5,020	1.8%	7,160	2.6%	7,440	2.6%
		-		83.4%		142.6%		103.9%
Basketball shoes	6,740	2.4%	6,545	2.4%	6,080	2.2%	6,045	2.1%
		-		97.1%		92.9%		99.4%
Sandals	6,100	2.2%	4,120	1.5%	3,270	1.2%	3,080	1.1%
		-		67.5%		79.4%		94.2%
Volleyball shoes	2,620	0.9%	2,460	0.9%	2,315	0.8%	2,300	0.8%
		-		93.9%		94.1%		99.4%
Others	9,620	3.5%	9,370	3.4%	9,355	3.4%	9,115	3.2%
		-		97.4%		99.8%		97.4%
Total	278,000	100.0%	274,020	100.0%	276,740	100.0%	283,560	100.0%
		-		98.6%		101.0%		102.5%