

Sports Apparel Market in Japan: Key Research Findings 2011

◆ **Research Outline**

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

1. Research period: September to November, 2011
2. Research target: 300 companies including manufacturers, wholesalers, and retailers and other sports related enterprises.
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/email surveys, and literature research

<What is the sports apparel?>

Sports apparel in this research indicates clothing made specialized for the following 14 categories of sports and purposes; training, golf, outdoors, lifestyle, soccer, baseball/softball, tennis, swimming, fitness, track & field, running, ski/snowboard, basketball, volleyball, and others. The “others” include sportswear for Judo, Karate, rugby, marine sports, table tennis, etc.

<What is functional underwear?>

Functional underwear is developed to provide some kind of effect to the body by wearing it. Depending on the type of functional underwear, the following effects are expected; improvement of athletic abilities, fatigue countermeasure, supporting of trunk posture, thermal sensing countermeasure (to keep the body from being heated or cooled too much) and etc. The functional underwear market is included in the sports apparel market.

◆ **Key Findings**

■ **Shipment volume in domestic sports apparel market is estimated to decline, marking 98.6 % of the previous year**

Domestic shipment (based on shipment volume from manufacturers) for sports apparel in 2011 is likely to end up as 489.590 billion yen, down by 1.4 % Y-on-Y. Within the entire sports apparel market, sportswear for outdoors, track & field, and running obtained a positive growth, those for soccer and basketball stayed at the same level, and those for all other categories fell from the previous year.

■ **Emerging of low-price apparel chain led training wear market to negative growth**

Domestic shipment volume for training wear in 2011 is estimated to be 107.8 billion yen, 95.8% of the previous year. A wear for warming up or a training jersey performed poorly due to emerging of price-competitive, low-price apparel chains. Those chains are replacing entry-level sports demands and daily demands that do not require advanced functions. On the other hand, those “SPA-style” low-price apparel chains are facing predicament due to their product lines ranging too wide, from lifestyle to sportswear, failing to be selected in the distribution of the sports-specialty clothing.

■ **Functional underwear can expect continuous growth by capturing new demand**

Domestic shipment volume for functional underwear in 2011 is estimated to be 31.2 billion yen, 102.0% of the previous year. Because the compression-support type underwear has already been accepted and widely spread among athletes in the recent few years, the potential growth of functional underwear market as a whole are now limited and has become relatively slow. However, with increasing popularity of marathon, the market is in good demand among city runners, including beginners, which is likely to lead to a new stage of growth.

Note that the compression-support type is top or bottom constrictive-type underwear which is included in functional underwear. They also have some variations. Some help keep the muscles from wobbling, some have the clothing fabric cut according to the action of the body as it moves, and some function as a sports taping to support articulations in order to prevent the body from injuries.

◆ **Report format:**

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■ **Table 1: Transition of Size of Domestic Sports Apparel Market**

(Left: Million yen; Right above: Composition rate,
Right below: Y-on-Y)

| | 2,009 | | 2,010 | | 2011 (Prospect) | | 2012 (Forecast) | |
|--------------------------|---------|--------|---------|--------|-----------------|--------|-----------------|--------|
| | | % | | % | | % | | % |
| Training wear | 109,450 | 21.7% | 112,500 | 22.7% | 107,800 | 22.0% | 108,200 | 21.9% |
| | | - | | 102.8% | | 95.8% | | 100.4% |
| Golfwear | 93,900 | 18.7% | 91,600 | 18.4% | 89,600 | 18.3% | 89,400 | 18.1% |
| | | - | | 97.6% | | 97.8% | | 99.8% |
| Outdoor wear | 55,600 | 11.0% | 58,100 | 11.7% | 63,800 | 13.0% | 68,100 | 13.8% |
| | | - | | 104.5% | | 109.8% | | 106.7% |
| Lifestyle wear | 47,090 | 9.4% | 40,550 | 8.2% | 38,080 | 7.8% | 38,090 | 7.7% |
| | | - | | 86.1% | | 93.9% | | 100.0% |
| Soccer wear | 35,900 | 7.1% | 35,550 | 7.2% | 35,650 | 7.3% | 36,350 | 7.3% |
| | | - | | 99.0% | | 100.3% | | 102.0% |
| Baseball/Softball wear | 29,590 | 5.9% | 29,240 | 5.9% | 29,160 | 6.0% | 29,450 | 6.0% |
| | | - | | 98.8% | | 99.7% | | 101.0% |
| Tennis wear | 26,200 | 5.2% | 24,800 | 5.0% | 23,900 | 4.9% | 23,400 | 4.7% |
| | | - | | 94.7% | | 96.4% | | 97.9% |
| Swimming suits | 18,360 | 3.6% | 17,580 | 3.5% | 16,820 | 3.4% | 17,030 | 3.4% |
| | | - | | 95.8% | | 95.7% | | 101.2% |
| Skiing/Snowboarding wear | 15,860 | 3.2% | 15,180 | 3.1% | 14,450 | 3.0% | 14,250 | 2.9% |
| | | - | | 95.7% | | 95.2% | | 98.6% |
| Fitness wear | 13,750 | 2.7% | 13,320 | 2.7% | 13,170 | 2.7% | 12,980 | 2.6% |
| | | - | | 96.9% | | 98.9% | | 98.6% |
| Track/Field/Running wear | 10,440 | 2.1% | 12,190 | 2.5% | 12,730 | 2.6% | 13,000 | 2.6% |
| | | - | | 116.8% | | 104.4% | | 102.1% |
| Basketball wear | 9,240 | 1.8% | 9,330 | 1.9% | 9,390 | 1.9% | 9,450 | 1.9% |
| | | - | | 101.0% | | 100.6% | | 100.6% |
| Volleyball wear | 5,040 | 1.0% | 4,820 | 1.0% | 4,750 | 1.0% | 4,730 | 1.0% |
| | | - | | 95.6% | | 98.5% | | 99.6% |
| Other sports wear | 32,840 | 6.5% | 31,770 | 6.4% | 30,290 | 6.2% | 30,500 | 6.2% |
| | | - | | 96.7% | | 95.3% | | 100.7% |
| Total | 503,260 | 100.0% | 496,530 | 100.0% | 489,590 | 100.0% | 494,930 | 100.0% |
| | | - | | 98.7% | | 98.6% | | 101.1% |

Notes:

1. The figures are based on retail volume.
2. Some categories have been reviewed and therefore the figures may not match with those in the past surveys.

■ **Figure 2: Transition of Shipment volume of Domestic Sports Apparel Market by Category**

