

## **Sports Shoes Market in Japan: Key Research Findings 2012**

### ◆ **Research Outline**

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

1. Research period: From May to August, 2012
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 indicate products shipped by sporting goods manufacturers and shoes manufacturers as “sports shoes.” The market size is calculated based on shipment volume and shipment value.

### ◆ **Key Findings**

#### ■ **Shipment of Domestic Sports Shoes Market in FY2011 was 100.7 % on Y-o-Y Basis in Volume, or 101.7% in Value**

There were 79.11 million pairs of sports shoes shipped domestically in 2011, 100.7% of the previous year, or 101.7 % in shipment value at 282.6 billion yen.

The recent boom for those categories of “running shoes,” “walking shoes,” and “out-door shoes” continue to be stable in the shipment, driving entire sports shoes market to a slight increase.

#### ■ **Shipment of Domestic Running Shoes in 2011 Marked 104.0% on Y-o-Y Basis in volume and 106.0 % in value**

Domestic running shoes market in 2011 attained a plus growth, at 18.05 million pairs, 104.0% of the previous year, or 106.0% in value at 50.14 billion yen. Running shoes market has continued achieving a plus growth, although the growth rate has become slow. A series of marathon events, Osaka Marathon, Kobe Marathon and Kyoto Marathon, that took place for the first time with this scale, increased many runners in western part of Japan to boost the market.

### ◆ **Report format:**

Published Report: “Sports Shoes Business 2012”

Issued on: August 31, 2012

Language: Japanese

Format: 553 pages in A4 format

Price: 146,475 yen (6,975 yen of consumption tax shall be charged for the sales in Japan.)

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■ **Figure 1: Transition of domestic shipment volume on domestic sports shoes**

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

	2009		2010		2011		2012 (estimated)	
		%		%		%		%
Multipurpose shoes (General casual sneakers)	23,100	30.3%	22,410	28.5%	21,090	26.7%	21,060	26.0%
		-		97.0%		94.1%		99.9%
Running shoes	15,600	20.4%	17,350	22.1%	18,050	22.8%	19,410	23.9%
		-		111.2%		104.0%		107.5%
Walking shoes	5,750	7.5%	6,970	8.9%	7,780	9.8%	7,900	9.7%
		-		121.2%		111.6%		101.5%
Kids/Infants shoes	7,040	9.2%	6,350	8.1%	6,200	7.8%	6,160	7.6%
		-		90.2%		97.6%		99.4%
Football shoes	5,645	7.4%	5,810	7.4%	6,030	7.6%	6,110	7.5%
		-		102.9%		103.8%		101.3%
Outdoor shoes	4,570	6.0%	4,920	6.3%	5,225	6.6%	5,490	6.8%
		-		107.7%		106.2%		105.1%
Baseball/Softball shoes	2,470	3.2%	2,570	3.3%	2,480	3.1%	2,660	3.3%
		-		104.0%		96.5%		107.3%
Sports sandals	3,100	4.1%	2,600	3.3%	2,480	3.1%	2,410	3.0%
		-		83.9%		95.4%		97.2%
Training shoes	1,330	1.7%	1,870	2.4%	2,110	2.7%	2,090	2.6%
		-		140.6%		112.8%		99.1%
Tennis shoes	2,055	2.7%	2,025	2.6%	1,985	2.5%	2,045	2.5%
		-		98.5%		98.0%		103.0%
Golf shoes	1,770	2.3%	1,720	2.2%	1,670	2.1%	1,700	2.1%
		-		97.2%		97.1%		101.8%
Basketball shoes	1,050	1.4%	1,035	1.3%	1,070	1.4%	1,080	1.3%
		-		98.6%		103.4%		100.9%
Volleyball shoes	580	0.8%	570	0.7%	590	0.7%	600	0.7%
		-		98.3%		103.5%		101.7%
Others	2,300	3.0%	2,340	3.0%	2,350	3.0%	2,375	2.9%
		-		101.7%		100.4%		101.1%
<b>Total</b>	<b>76,360</b>	<b>100.0%</b>	<b>78,540</b>	<b>100.0%</b>	<b>79,110</b>	<b>100.0%</b>	<b>81,090</b>	<b>100.0%</b>
		-		102.9%		100.7%		102.5%

■ **Figure 2: Transition of domestic shipment value on domestic sports shoes**

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

	2009		2010		2011		2012 (estimated)	
		%		%		%		%
Multipurpose shoes (General casual sneakers)	78,240	28.7%	72,440	26.1%	68,020	24.1%	67,930	23.4%
		-		92.6%		93.9%		99.9%
Running shoes	43,370	15.9%	47,300	17.0%	50,140	17.7%	54,500	18.8%
		-		109.1%		106.0%		108.7%
Walking shoes	36,910	13.5%	43,180	15.5%	47,090	16.7%	47,700	16.4%
		-		117.0%		109.1%		101.3%
Outdoor shoes	23,900	8.8%	25,925	9.3%	27,710	9.8%	29,190	10.1%
		-		108.5%		106.9%		105.3%
Football shoes	18,050	6.6%	18,240	6.6%	18,800	6.7%	18,970	6.5%
		-		101.1%		103.1%		100.9%
Kids/Infants shoes	14,930	5.5%	13,410	4.8%	13,080	4.6%	12,940	4.5%
		-		89.8%		97.5%		98.9%
Golf shoes	11,480	4.2%	10,600	3.8%	10,280	3.6%	10,660	3.7%
		-		92.3%		97.0%		103.7%
Baseball/Softball shoes	10,600	3.9%	10,330	3.7%	10,250	3.6%	10,880	3.8%
		-		97.5%		99.2%		106.1%
Training shoes	5,020	1.8%	7,170	2.6%	7,900	2.8%	7,760	2.7%
		-		142.8%		110.2%		98.2%
Tennis shoes	8,180	3.0%	8,020	2.9%	7,870	2.8%	8,015	2.8%
		-		98.0%		98.1%		101.8%
Basketball shoes	6,310	2.3%	6,200	2.2%	6,415	2.3%	6,495	2.2%
		-		98.3%		103.5%		101.2%
Sports sandals	4,120	1.5%	3,390	1.2%	3,180	1.1%	3,050	1.1%
		-		82.3%		93.8%		95.9%
Volleyball shoes	2,460	0.9%	2,310	0.8%	2,440	0.9%	2,470	0.9%
		-		93.9%		105.6%		101.2%
Others	9,370	3.4%	9,415	3.4%	9,425	3.3%	9,500	3.3%
		-		100.5%		100.1%		100.8%
<b>Total</b>	<b>272,940</b>	<b>100.0%</b>	<b>277,930</b>	<b>100.0%</b>	<b>282,600</b>	<b>100.0%</b>	<b>290,060</b>	<b>100.0%</b>
		-		101.8%		101.7%		102.6%