

Linen Supply Market in Japan: Key Research Findings 2012

◆ Research Outline

Yano Research Institute has conducted a study on the domestic linen supply market with the following conditions:

1. Research period: From November to December, 2012
2. Research targets: Domestic leading linen suppliers, manufacturers and wholesalers of linen products and equipments used for linen supply
3. Research methodologies: Face-to-face interviews by the expert researchers, mail-in questionnaire

What is Linen Supply Market?

The linen supply market in this research indicates the services of lending linen products to businesses such as enterprises, stores and factories, with cleaning services included. The market is classified into nine categories including the “hotel linens,” to lend bed linens and towels to hotels and Japanese inns, the “hospital linens,” to lend bedclothes for hospitals and other medical facilities, the “food linens,” to lend linen goods and uniforms for restaurants. For entire categories, please refer to “Table 1” at the end of this report.

◆ Key Findings

■ Linen Supply Market in FY2011 is Estimated to be 528.8 Billion Yen, Down by 2.1% from FY2009

Size of the linen supply market in FY2011 is estimated as 528.829 billion yen, declined by 2.1% from FY2009. The market faces both reduced average spending per customer, due to increasing price pressure from the businesses, and price hike of crude oil and other materials from which linens are made. Therefore, the linen suppliers are in predicament with worsened profitability.

■ Relatively in Good Demands are Two Categories: “Service Linens” and “Industrial Linens”

Whereas the sales of all other categories of linens have fallen, the “service linens” category has been leveled off, due to increase of demands at fitness clubs, aesthetic salons, and other facilities, supported by consumers’ aspiration after health and beauty, and also due to increase of spas. The “industrial linens” category has also kept its rising tendency, albeit slightly, because of the steady demands of uniforms for factories of both foods and medicines, where strict sanitary standards must be ensured.

◆ **Report format :**

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Price: 101,850 yen (4,850 yen of consumption tax shall be charged for the sales in Japan.)

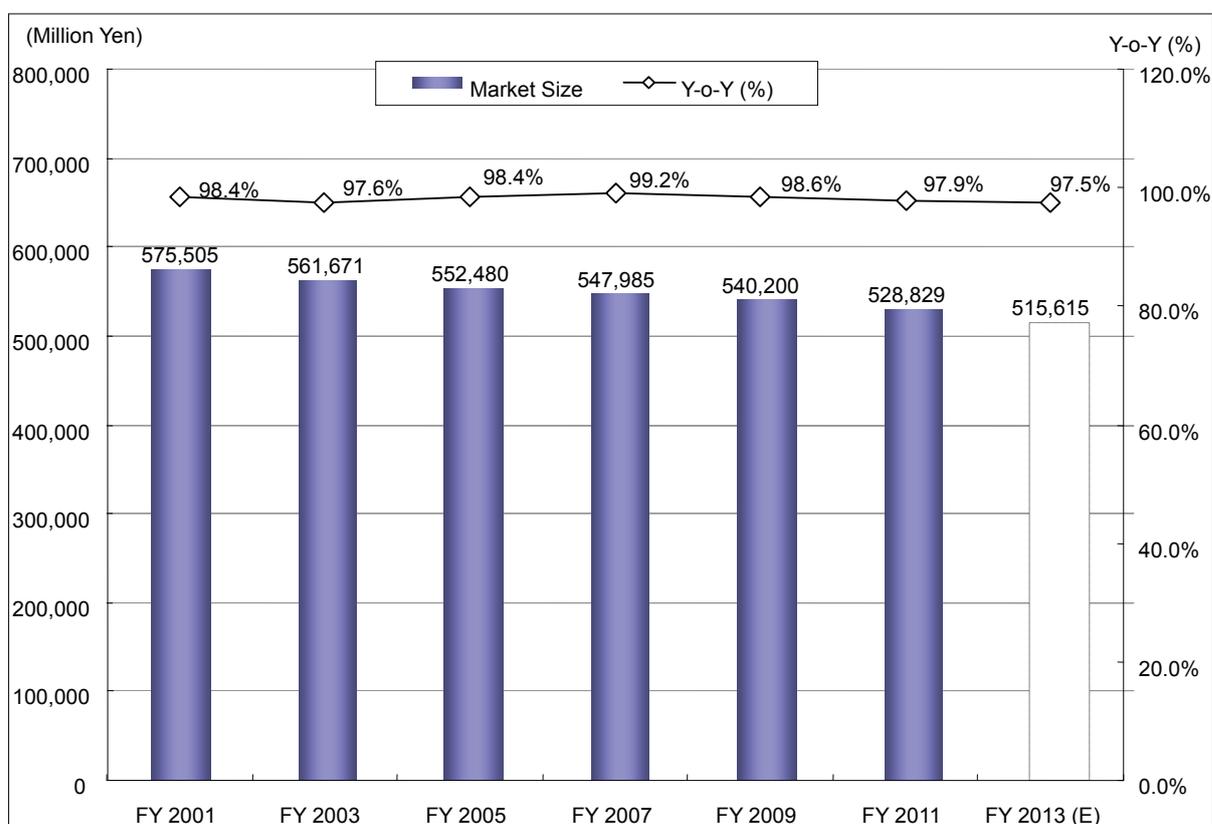
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■ **Figure 1: Transition of Linen Supply Market**



	(Million Yen)						
	FY 2001	FY 2003	FY 2005	FY 2007	FY 2009	FY 2011	FY 2013 (E)
Linen Supply Market Size	575,505	561,671	552,480	547,985	540,200	528,829	515,615
Y-o-Y (%)	98.4%	97.6%	98.4%	99.2%	98.6%	97.9%	97.5%

Notes:

Estimated by YRI

1. The figures are based on the sales of businesses.
2. (E) indicates estimated figure.

■ **Table 1: List of Categories Consisting the Linen Supply Market**

Categories	Type of linens
Hotel Linens	Bed linens, towels and others for hotels and Japanese inns.
Hospital Linens	Bedclothes for hospitals, clinic, and nursery homes.
Food Linens	Linens and uniforms for restaurants, diners, and etc.
Service Linens	Towels and uniforms used at Sauna, aesthetic salons, reflexology and other salons.
Industrial Linens	Uniforms of factories and other facilities.
Traffic Linens	Linens used for Shinkansen bullet trains, limited express, sleeping cars, ships, and airplanes.
Diapers	Diapers for children and elderly used in child care facilities and nurseries.
Rental Hand towels	Hand towels used at restaurants, sports facilities, and amusement facilities.
Dust Control	Doormats, mops, cabinet towels used in industrial facilities and for households.