

Bags and Purses Market in Japan: Key Research Findings 2012

◆ Research Outline

Yano Research Institute has conducted a study on the domestic bags and purses market with the following conditions:

1. Research period: From October to December, 2012
2. Research targets: Manufacturers, wholesalers, and retailers in the industry of bags, purses and belts, companies in the peripheral industries (manufacturers, wholesalers and suppliers in the industry of leather/artificial leather, fabrics/textiles and etc.), and importers and exporters.
3. Research methodologies: Face-to-face interviews by the expert researchers, mail-in questionnaire, and literature research of statistics from relevant public offices and industrial organizations

What are Bags and Purses?

Bags in this research include large bags for men, smaller bags for women and those to be used as trinket boxes, business bags, traveling bags, hand bags, purses, leather goods, and belts.

What is the domestic bag and purse market?

The domestic bags and purses market in this research indicates a total size of luxury import brands, domestic and licensed brands markets, calculated based on retail values.

◆ Key Findings

■ **Size of Domestic Bag and Purse Market in FY2011 Bottomed Out for First time in 10 Years to Attain 905.1 Billion Yen, 101.7% of Previous Year; Though Slight Decline Estimated in FY2012**

The domestic bags and purses market in FY2011 has bottomed out for the first time in ten fiscal years to attain 905.1 billion yen, 101.7% of the previous year, based on the retail values. This stems from recovery of demands for expensive products, more demands for traveling bags due to increase of travelers, and sales expansion in business and casual bags for men. Although FY2012 sees more stores with new business style selling items such as textile bags/purses and leather goods, the bags and purses market for FY2012 is likely to decline to 898.0 billion yen, 99.2% of the previous year, influenced by some negative factors including shrinking licensed brands market.

■ **Imported Brands Market Increased for the First Time after 5 Years of Decline**

Among the various categories within the bags and purses market, imported brands market achieved 387.8 billion yen in FY2011, 104.0% of the previous year, returning to positive growth for the first time in five years. Although licensed brands market declined to end up at 131.7 billion yen, 98.3% of the previous year, domestic brands market slightly increased to

achieve 385.6 billion yen, 100.6% of the prior year. Such trends was caused by increasing number of consumers wanting to use good products for a long period of time, which drove them to return to expensive products of imported brands. On the other hand, purses and leather goods with reasonable prices also increased the sales.

◆ **Report format :**

Published report: “Bag and Purse Market 2012”

Issued on: December 26, 2012

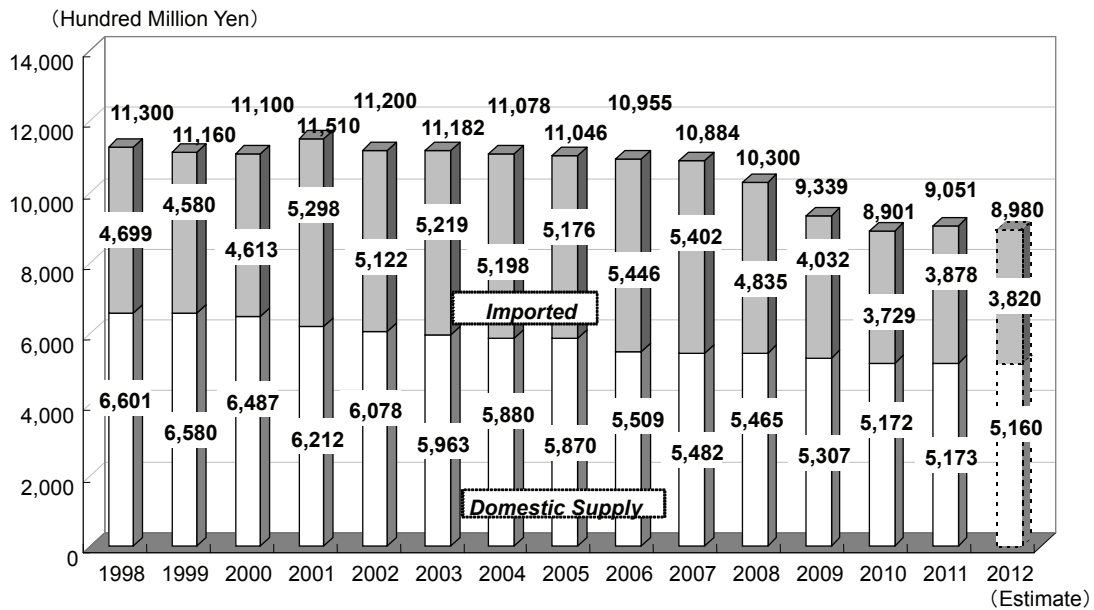
Language: Japanese

Format: 428 pages in A4 format

Price: 115,000 yen (5,500 yen of consumption tax shall be charged for the sales in Japan.)

Contacts: Public Relations
Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)
 Phone: +81-3-5371-6912 E-mail: press@yano.co.jp

■ **Figure 1: Transition of Size of Bags and Purses Market**



(Hundred Million Yen)

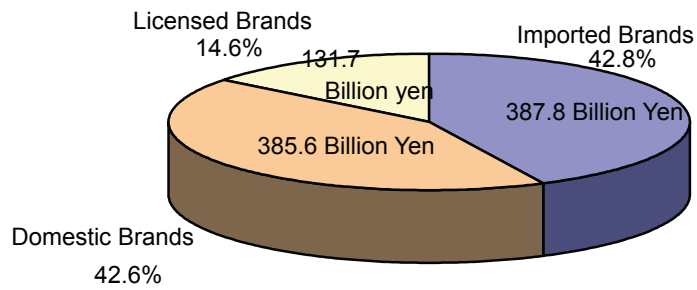
FY	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012 (E)
Market Size	11,300	11,160	11,100	11,510	11,200	11,182	11,078	11,046	10,955	10,884	10,300	9,339	8,901	9,051	8,980
Y-o-Y (%)	97.6	98.8	99.5	103.7	97.3	99.8	99.1	99.7	99.2	99.4	94.6	90.7	95.3	101.7	99.2

Notes:

Estimated by YRI

2. The market size in this research was calculated based on retail value.
3. (E) stands for estimated figure.
4. Domestic Supply means total size of the markets of domestic brands and licensed brands.
5. The bags and purses market includes such items as purses, leather goods and belts developed by market players.

■ **Figure 2: Size of Bags and Purses Market by Category**



Estimated by YRI

Notes:

5. The market size in this research was calculated based on retail value.
6. The bag and purse market includes such items as purses, leather goods and belts developed by market players.