

Shoes and Footwear Market in Japan: Key Research Findings 2012

◆ Research Outline

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

1. Research period: October 2012 to February 2013
2. Research target: Manufacturers, wholesalers and retailers in the industry of shoes, footwear and shoe materials, and companies in peripheral industries, importers and exporters
3. Research methodologies: Face-to-face interviews by the specialized researchers, mail-in questionnaire, literature research using statistic data from government ministries and agencies, and from related organizations.

<What are Shoes and Footwear?>

Shoes and footwear in this research indicate products such as “leather shoes,” “rubber shoes,” “chemical shoes,” “sandals,” and others categorized as “Footwear, gaiters and the like” in the Trade Statistics and Industrial Statistics. Shoes and Footwear market is calculated based on the retail value of those products.

◆ Key Findings

■ Market Size of Shoes and Footwear in FY2012 Estimated as 1,314.5 Billion Yen, 99.4% on Y-o-Y Bases

The market size of domestic shoes and footwear in FY2011 attained 1,322.5 billion yen, 99.8% of the previous year based on the retail value. The market is still suffering from slow consumption that is discouraging purchase opportunities and reducing purchase price of consumers. The market is likely to go through similar environment in FY2012, with estimated market size to end up as 1,314.5 billion yen, 99.4% of the prior year.

■ Drawing Attention are Functional Shoes such as Comfortable Shoes and Shoes that Enable to Run Faster

Recently, those comfortable shoes and footwear that are free from pains even in the long-distant walk have become popular in the market, both for men and women. Also, those functional shoes that enable people to run faster have gained popularity and are anticipated to continue attracting attention in the sports shoes and children’s shoes market.

◆ **Report format:**

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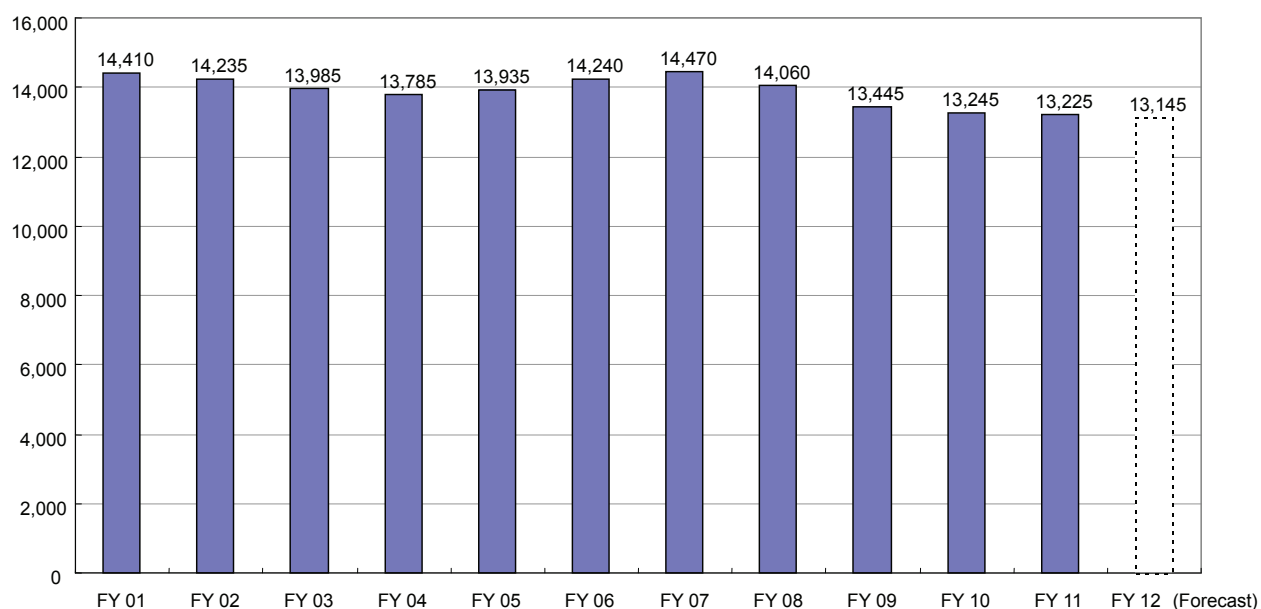
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■ **Figure 1: Transition of Size of Shoes and Footwear Market**

(Hundred Million Yen)



	(Hundred Million yen, %)												
	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012 (F)	
Market Size	14,410	14,235	13,985	13,785	13,935	14,240	14,470	14,060	13,445	13,245	13,225	13,145	
Y-o-Y		99.2	98.8	98.2	98.6	101.1	102.2	101.6	97.2	95.6	98.5	99.8	99.4

Notes:

1. Figures are based on retail values.
2. (F) stands for “forecast.”

Estimated by YRI

■ **Figure 2: Transition of Shoes and Footwear Retail Market by Item**

(Hundred Million yen. %)

	FY 2006		FY 2007		FY 2008		FY 2009		FY 2010		FY 2011		FY 2012 (Forecast)	
		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y
		Comp.ratio		Comp.ratio		Comp.ratio		Comp.ratio		Comp.ratio		Comp.ratio		Comp.ratio
Men's Shoes	2,610	101.8	2,630	100.8	2,450	93.2	2,300	93.9	2,250	97.8	2,190	97.3	2,180	99.5
		18.3		18.2		17.4		17.1		17.0		16.6		16.6
Women's Shoes	4,460	99.6	4,340	97.3	4,100	94.5	3,730	91.0	3,670	98.4	3,650	99.5	3,560	97.5
		31.3		30.0		29.2		27.7		27.7		27.6		27.1
Sport Shoes	4,730	103.5	4,850	102.5	4,930	101.6	4,935	100.1	4,985	101.0	5,040	101.1	5,170	102.6
		33.2		33.5		35.1		36.7		37.6		38.1		39.3
Baby/ Children's Shoes	840	102.4	850	101.2	870	102.4	900	103.4	890	98.9	880	98.9	870	98.9
		5.9		5.9		6.2		6.7		6.7		6.7		6.6
Others	1,600	106.7	1,800	112.5	1,710	95.0	1,580	92.4	1,450	91.8	1,465	101.0	1,365	93.2
		11.2		12.4		12.2		11.8		10.9		11.1		10.4
Total	14,240	102.2	14,470	101.6	14,060	97.2	13,445	95.6	13,245	98.5	13,225	99.8	13,145	99.4
		100.0		100.0		100.0		100.0		100.0		100.0		100.0

Estimated by YRI

Notes:

4. Figures are based on retail values.
5. Comp. ratio stands for composition ratio.
6. "Sports shoes" in this research indicate products that are shipped as "sports shoes" by manufacturers of sport shoes, shoes and footwear.
7. "Others" include boots, work shoes and etc.