

Bags and Purses Market in Japan: Key Research Findings 2013

◆ Research Outline

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

1. Research period: From July to September, 2013
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 is the Bags and Purses Market?

Bags and purses in this research mainly indicate large bags for men and handbags or small cases for women, which include business bags, traveling bags, hand bags, purses, leather goods, and belts.

The bags and purses market is consisted of imported brands and domestically supplied products. Among them, the domestically supplied products are consisted of products with licensed brands and domestic brands, with size of both of the markets calculated based on the retail prices.

◆ Key Findings

■ **Size of Domestic Bags and Purses Market in FY2012 Rose to 935.8 Billion Yen, 103.4% of Previous Year; Attaining Second Consecutive Growth**

The domestic bags and purses market in FY2012 attained 935.8 billion yen, 103.4% of the size in the previous year based on the retail prices. The market shows sales recovery in imported brand products because customers come to demand high-quality goods for a long period of time, one of the purchasing trends seen after occurrence of the Great East Japan Earthquake. Also, the products proposed something new, both for men and women, are selling well.

■ **60% of Manufacturers, Wholesalers, Importers and Exporters of Bags and Purses Raised Product Prices Prior to Consumer Tax Increase Due to Higher Raw-Material Prices and Weakened Yen**

When asked to 54 enterprises that are manufacturers, wholesalers and importers/exporters of bags and purses about any changes of product prices, 24.1% of such companies responded that they raised the prices of goods in the first half (January to June) of 2013, 35.2% answered that they raised/are going to raise product prices in the second half (July to December) of 2013, totaling over 60% have raised or going to raise the product prices.

◆ **Report format :**

Published report: “Bag and Purse Market 2013”

Issued on: October 7, 2013

Language: Japanese

Format: 471 pages in A4 format

Price: 131,250 yen (6,250 yen of consumption tax shall be charged for the sales in Japan.)

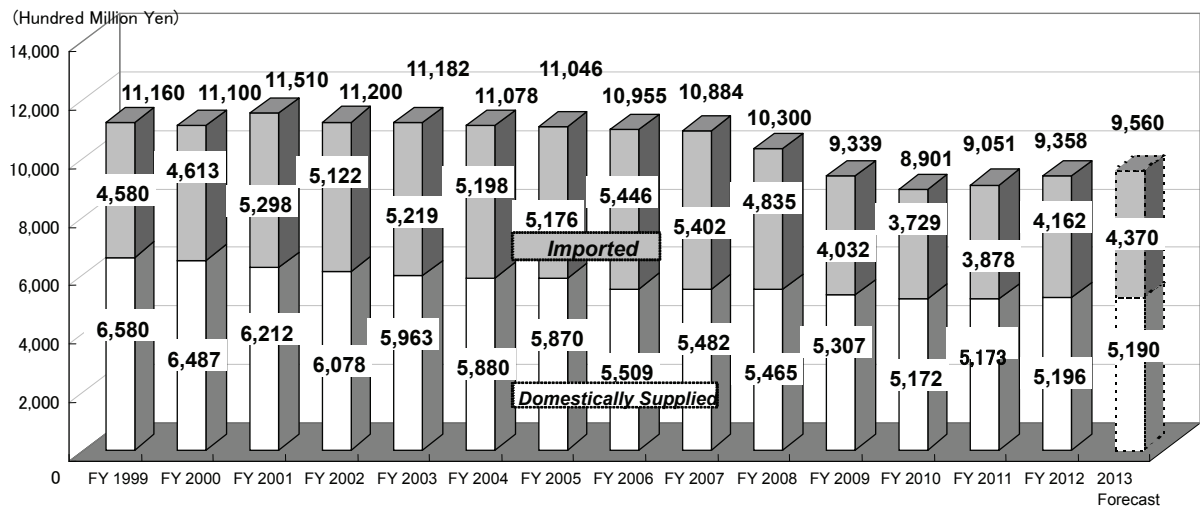
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■ **Figure 1: Transition of Size of Bags and Purses Market**



(Hundred Million Yen)

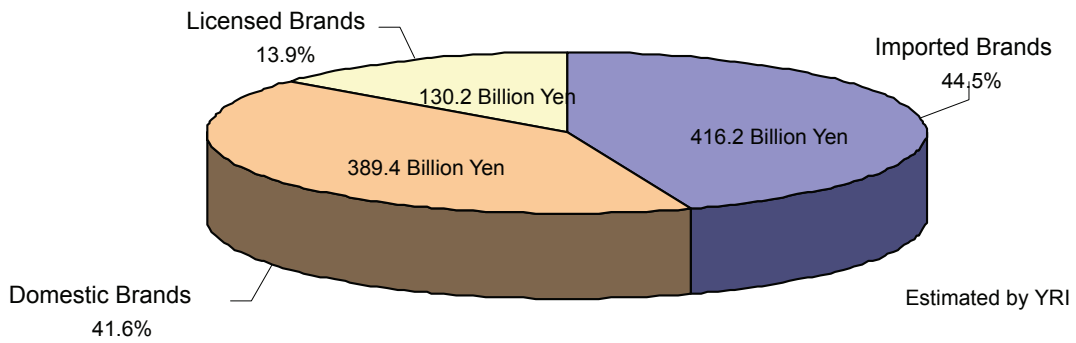
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013 Forecast	
Market Size	11,160	11,100	11,510	11,200	11,182	11,078	11,046	10,955	10,884	10,300	9,339	8,901	9,051	9,358	9,560	
Y-o-Y (%)		98.8%	99.5%	103.7%	97.3%	99.8%	99.1%	99.7%	99.2%	99.4%	94.6%	90.7%	95.3%	101.7%	103.4%	102.2%

Notes:

- The market size in this research was calculated based on retail value.
- Domestically Supplied means total size of the markets of domestic brands and licensed brands.
- The bags and purses market includes such items as purses, leather goods and belts developed by market players.

Estimated by YRI

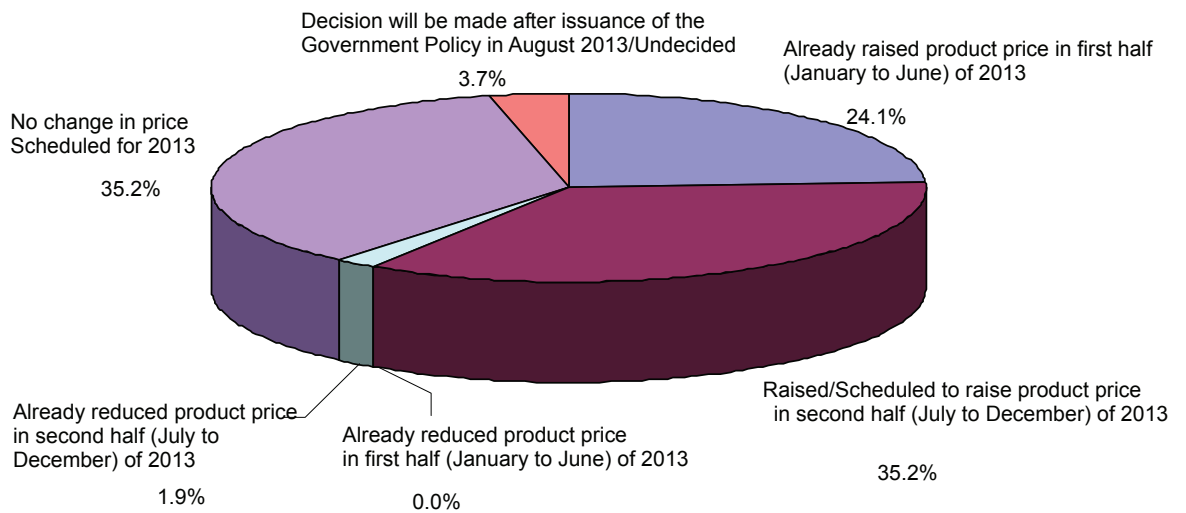
■ **Figure 2: Size of Bags and Purses Market by Category**



Notes:

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

■ **Figure 3: Survey on Changes in Product Prices**



■ **Figure 4: Reasons of Changes in Product Prices**

