

Sports Apparel Market in Japan: Key Research Findings 2013

◆ **Research Outline**

Yano Research Institute has conducted a study on the sports apparel market with the following conditions:

1. Research period: August to November, 2013
2. Research target: Manufacturers, wholesalers, and retailers and other sports related enterprises.
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/email surveys, and questionnaire surveys

<What is the Sports Apparel Market?>

The sports apparel market in this research indicates clothing made specialized for the following 13 categories; training, golf, outdoors, lifestyle, soccer/futsal, baseball/softball, tennis, swimming, fitness, track & field/running, ski/snowboard, basketball, and others. The “others” include sportswear for Volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

<What is Functional Underwear?>

The functional underwear is developed to provide some kind of effect to the body by wearing it. Depending on the type of functional underwear, the following effects are expected; improvement of athletic abilities, preventing from too-much fatigue, helping to strengthen the core and to straighten up the posture, keeping the body from being heated or cooled too much, and etc.

The functional underwear market is included in the sports apparel market. Such underwear is included as a part of underwear in each of sports categories.

<What is Sports Supporter Business?>

Sports supporters are developed to absorb impacts to the joints and to support athletic abilities when the people wearing them do some sports or exercise. The market size is calculated based on the shipment value of the brands sold through sports goods retailers and companies that are the targets and respondents of our survey.

◆ **Key Findings**

■ **Shipment Volume of Domestic Sports Apparel Market in 2013 Anticipated to be 102.5% of Size of Previous Year, Attaining Positive Growth**

The sports apparel market in 2013 is likely to achieve 515.880 billion yen, 102.5% of the previous year based on the shipment value of manufacturers. Except for lifestyle wear and snowboarding wear which failed to reach the size of the previous year, all other 10 sports categories are likely to exceed the figures of prior year respectively. Among those categories, track & field/running attained favorable results.

■ **Though Training Wear Likely to Manage Positive Growth, Hardship Continues**

Domestic shipment value of training wear in 2013 is estimated to attain 120.3 billion yen, 100.6% of the size of the previous year. Since the consumer trends towards health and beauty attract interests towards sports and create large demands for sports wear, the training wear market is likely to attain positive growth, though the growth rate is only slightly. However, manufacturers and retailers of training wear are not optimistic about the outlook because of shrinking demands for jerseys which are main items, and of lengthy hot summer lasting until the end of September that prevented the sales of items for autumn and winter.

■ **Promising Market is Track & Field/Running Wear, Attaining 107.5% of Previous Year**

The domestic track & field/running wear market in 2013 is likely to achieve 15.570 billion yen, 107.5% of the size of the previous year, based on the shipment value of manufacturers. In addition to highly favorable sales of running wear that stems from continuous increase of beginner-level runners, the running wear market has entered another aspect of growth, providing products that vary in design.

■ **Running and Outdoor Fans Continuously Raising Functional Underwear Market**

The domestic functional underwear market in 2013 is anticipated to reach 34.1 billion yen, 101.8% of the previous year, based on the shipment value of manufacturers. The market is boosted by the boom of running and outdoor activities, establishing the market of the compression-support type underwear usually worn underneath the running wear or outdoor wear. The market of the compression-support type underwear in 2013 is estimated to reach 26.350 billion yen, 102.1% of the previous year.

◆ **Report format:**

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■ **Table 1: Transition of Size of Domestic Sports Apparel Market**

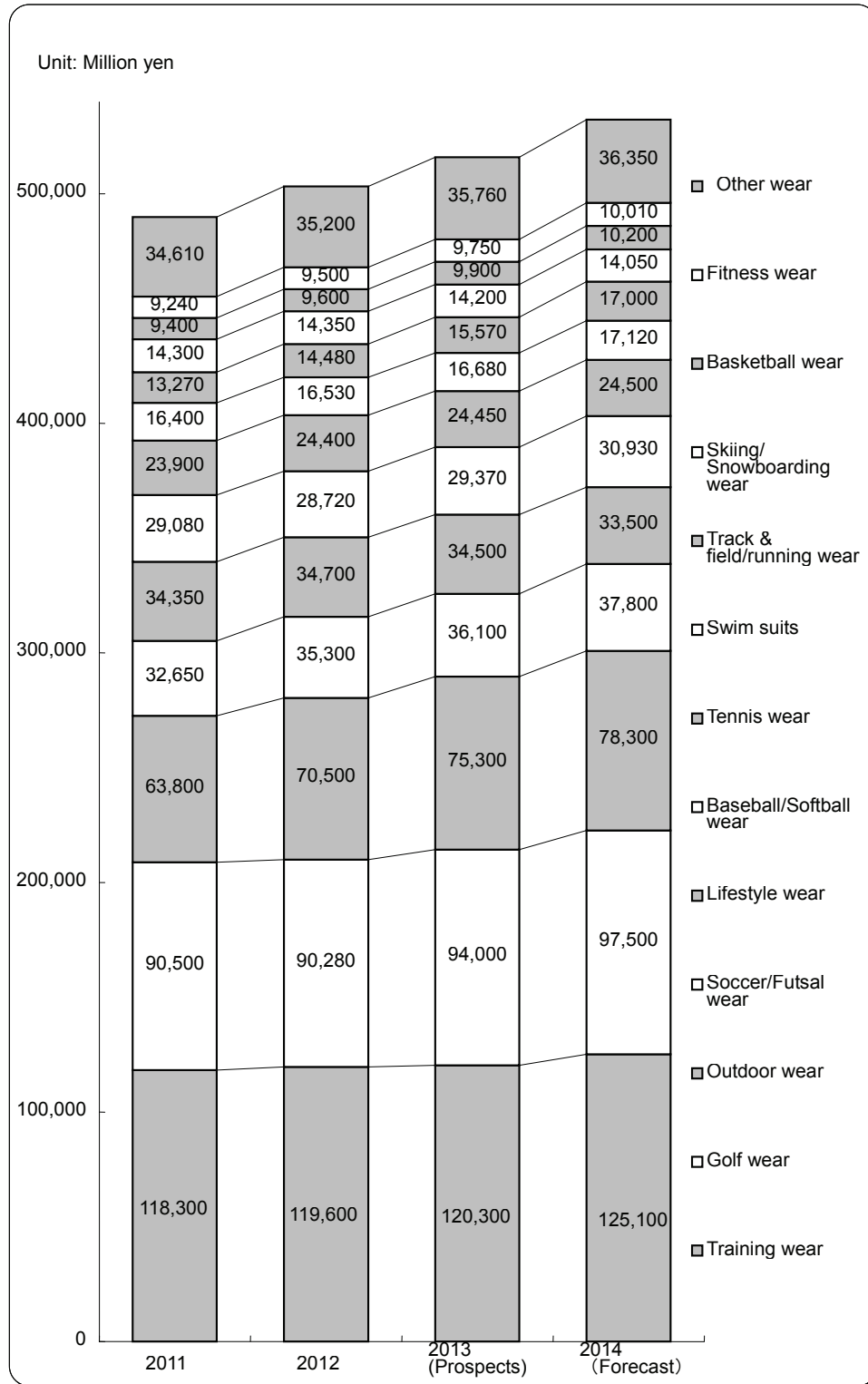
(Left: Million yen; Right above: Composition rate,
Right below: Y-on-Y)

	2011		2012		2013 (Prospects)		2014 (Forecast)	
	Million yen	%	Million yen	%	Million yen	%	Million yen	%
Training Wear	118,300	24.2%	119,600	23.8%	120,300	23.3%	125,100	23.5%
Golf Wear	90,500	18.5%	90,280	17.9%	94,000	18.2%	97,500	18.3%
Outdoor Wear	63,800	13.0%	70,500	14.0%	75,300	14.6%	78,300	14.7%
Soccer/Futsal Wear	32,650	6.7%	35,300	7.0%	36,100	7.0%	37,800	7.1%
Lifestyle Wear	34,350	7.0%	34,700	6.9%	34,500	6.7%	33,500	6.3%
Baseball/Softball Wear	29,080	5.9%	28,720	5.7%	29,370	5.7%	30,930	5.8%
Tennis Wear	23,900	4.9%	24,400	4.8%	24,450	4.7%	24,500	4.6%
Swim suits	16,400	3.3%	16,530	3.3%	16,680	3.2%	17,120	3.2%
Track/Field/Running Wear	13,270	2.7%	14,480	2.9%	15,570	3.0%	17,000	3.2%
Skiing/Snowboarding Wear	14,300	2.9%	14,350	2.9%	14,200	2.8%	14,050	2.6%
Basketball Wear	9,400	1.9%	9,600	1.9%	9,900	1.9%	10,200	1.9%
Fitness Wear	9,240	1.9%	9,500	1.9%	9,750	1.9%	10,010	1.9%
Other Sports Wear	34,610	7.1%	35,200	7.0%	35,760	6.9%	36,350	6.8%
Total	489,800	100.0%	503,160	100.0%	515,880	100.0%	532,360	100.0%

Notes:

1. The figures are based on the shipment value of manufacturers.
2. "Other Sports Wear" include sportswear for Volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

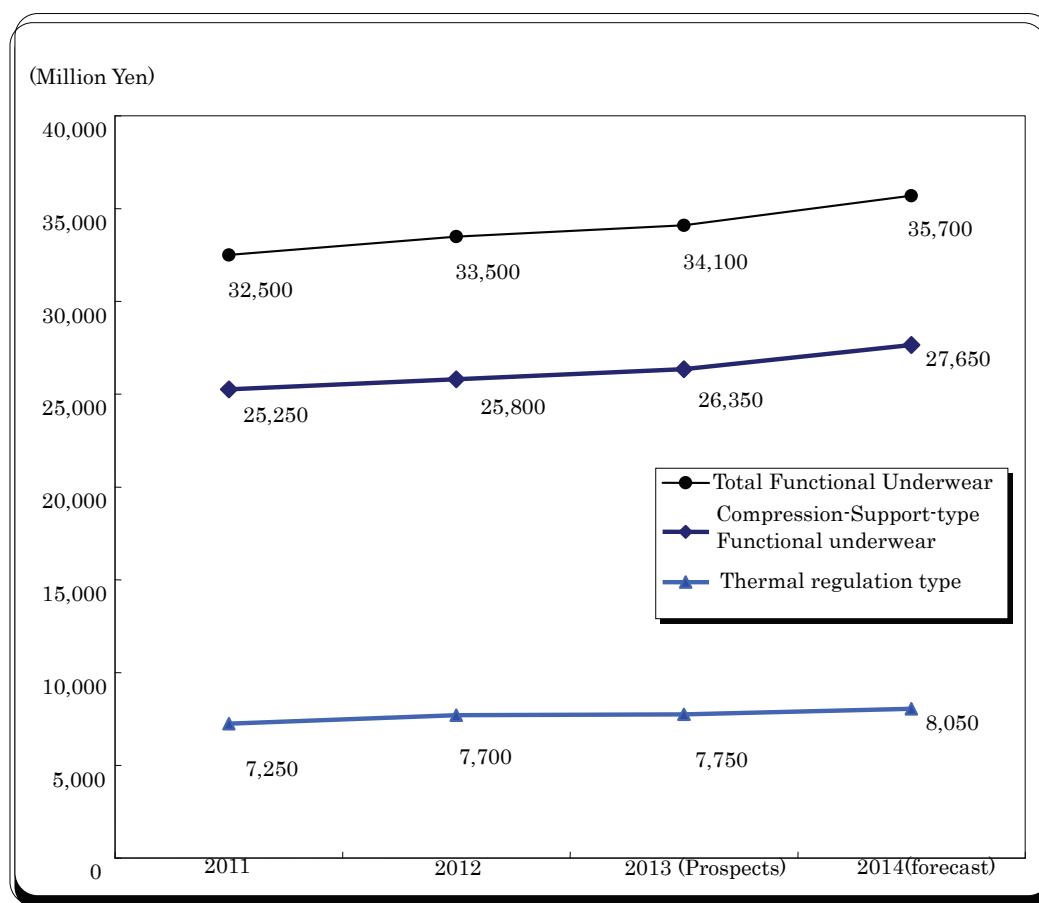
■ **Figure 1: Transition of Shipment volume of Domestic Sports Apparel Market by Category**



Notes:

3. The figures are based on the shipment value of manufacturers.
4. "Other Sports Wear" includes sportswear for Volleyball, Judo, Karate, rugby, marine sports, table tennis, etc.

■ **Figure 2: Transition of Size of Functional Underwear Market**



Notes:

5. The figures are based on the shipment value of manufacturers.
6. The functional underwear market is included in the sports apparel market. Such underwear is included as a part of underwear in each of sports categories. The market size is calculated by adding up those from each of the sports categories.