

## Home Fashion Market in Japan: Key Research Findings 2017

### ◆ Research Outline

**Yano Research Institute has conducted a study on the domestic home fashion market with the following conditions:**

1. Research period: August to October, 2017
2. Research target: Manufacturers, wholesalers and retailers involved in the business of home fashion industry
3. Research methodologies: Face-to-face/telephone interviews by the expert researchers, interviews via telephone, and literature research

#### <What is the Home Fashion Market?>

The home fashion market in this research consists of the following seven categories: Bed linen/beddings; Towel goods; Nightwear/home wear; Home-use furniture; Interior fabrics; Home-use lighting fixtures; and Kitchenware/tableware. These categories are generally used for households, but some home-use furniture and kitchenware/tableware include demands from companies.

### ◆ Key Findings

#### ■ Size of Home Fashion Retail Market in 2016 Declined to 3,426.4 Billion Yen, 97.7% on Y-o-Y Basis

The home fashion retail market in 2016 declined to 3,426.4 billion yen, 97.7% of the size of the previous year. The category of towel goods have grown due to successful long-term branding strategies in the places of production such as Imabari and Senshu, but product sales in other categories as a whole have recorded negative growth because of the downturn from the rise in the previous year.

On the other hand, a large furniture retail chain has succeeded in developing a strategy to shift the locations for opening stores from suburbs to the urban areas and also to open small stores rather than large ones, which have driven the entire home fashion market.

#### ■ Size of Home Fashion Retail Market in 2017 Projected to Attain 3,461.0 Billion Yen, 101.0% on Y-o-Y Basis, New Demand Explored by Pursuing Improvement in Buying Experience, Convenience, and Services

The home fashion retail market in 2017 is projected to attain 3,461.0 billion yen, 101.0% of the size of the previous year. At some online sales service providers, new demands have been developed by providing product description through moving images and other attempts to improve buying experience of consumers, i.e., to make them feel easy to buy and convenient. At some real stores, especially those furniture and other products with high unit price which are difficult to sell unless grasping the taste and preference of customers, some efforts have been made to expand sales opportunities such as to provide highly important information and to wait on the customers respectfully. The home fashion market as a whole is projected to stay stable by such attempts and efforts.

### ◆ Report Format:

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Price: 125,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

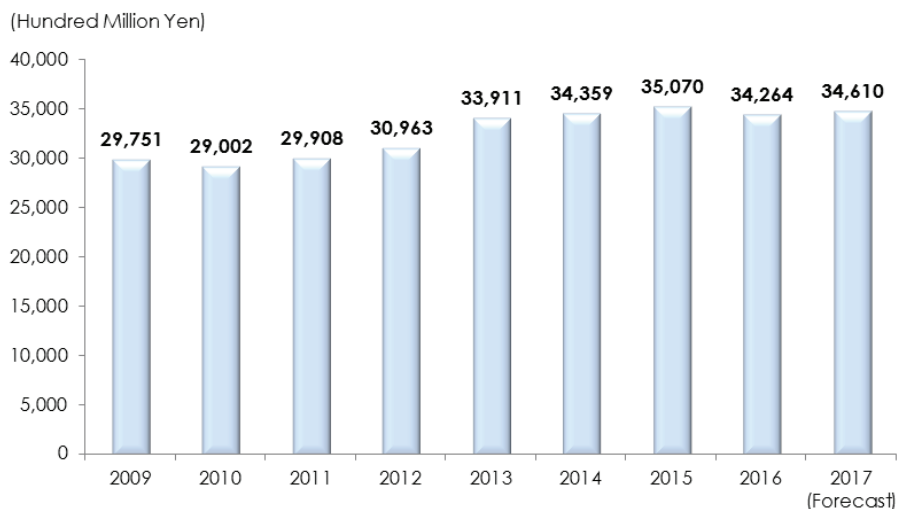
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■ **Figure & Table 1: Transition of Size of Home Fashion Retail Market**



Estimated by Yano Research Institute

Hundred Million Yen

Categories	2009	Y-o-Y	2010	Y-o-Y	2011	Y-o-Y	2012	Y-o-Y	2013	Y-o-Y	2014	Y-o-Y	2015	Y-o-Y	2016	Y-o-Y	2017 (Forecast)	Y-o-Y
Bed linen/beddings	4,681	96.0%	4,708	100.6%	4,918	104.5%	5,123	104.2%	6,543	127.7%	6,699	102.4%	6,920	103.3%	6,796	98.2%	6,830	100.5%
Towel goods	1,525	94.1%	1,445	94.8%	1,480	102.4%	1,560	105.4%	1,630	104.5%	1,625	99.7%	1,600	98.5%	1,660	103.8%	1,670	100.6%
Nightwear/home wear	1,417	85.3%	1,445	102.0%	1,517	105.0%	1,482	97.7%	1,586	107.0%	1,625	102.5%	1,650	101.5%	1,470	89.1%	1,500	102.0%
Home-use furniture	9,206	91.9%	8,491	92.2%	8,815	103.8%	9,215	104.5%	9,700	105.3%	9,923	102.3%	10,200	102.8%	9,990	97.9%	10,100	101.1%
Interior fabrics	5,368	89.0%	5,404	100.7%	5,458	101.0%	5,566	102.0%	5,782	103.9%	5,822	100.7%	5,840	100.3%	5,828	99.8%	5,860	100.5%
Home-use lighting fixtures	3,879	94.6%	3,840	99.0%	3,975	103.5%	4,125	103.8%	4,340	105.2%	4,400	101.4%	4,440	100.9%	4,370	98.4%	4,400	100.7%
Kitchenware/tableware	3,675	89.3%	3,669	99.8%	3,745	102.1%	3,892	103.9%	4,330	111.3%	4,265	98.5%	4,420	103.6%	4,150	93.9%	4,250	102.4%
Home Fashion Retail Market Size (Total)	29,751	91.8%	29,002	97.5%	29,908	103.1%	30,963	103.5%	33,911	109.5%	34,359	101.3%	35,070	102.1%	34,264	97.7%	34,610	101.0%

Estimated by Yano Research Institute

Notes:

1. The market size is based on the retail amounts.
2. This research basically targets the items used for households, but some home-use furniture and kitchenware/tableware include demands from companies.
3. The market size of “Bed linen/beddings” and “Nightwear/home wear” from 2008 to 2013 are extracted from the data by NIHON SHINSO SINBUN CO.,LTD. The market size in 2014 and beyond is estimated by Yano Research Institute.
4. The market size of Interior fabrics is calculated based on fiscal years.

■ **Reference: Seven Categories that Consist Home Fashion Market**

Major 7 Categories	Major Items
Bed linen/beddings	Bed sheets, bedding-related covers, beddings, blankets, pillows, etc.
Towel goods	Towel products, toweling, etc.
Nightwear/home wear	Pajamas, night dresses, robes, lounge wears, etc.
Home-use furniture	Chests, chest of drawers, chairs, shelves, beds, sofas, dining tables, etc.
Home-use lighting fixtures	Installed, on-the-table, pendant-type, and other types of lighting fixtures
Interior fabrics	Curtains, blinds, screens, carpets, rugs, wallpapers, etc.
Kitchenware/tableware	Tableware, glasses, cutlery, kitchen tools, etc.

Survey by Yano Research Institute