

Shoes and Footwear Market in Japan: Key Research Findings 2010

➤ **Research Outline**

Yano Research Institute has conducted a study on the shoes and footwear market in Japan with following conditions.

1. Research period: August to October 2010
2. Research targets: Shoes & footwear manufacturers, related material manufacturers, wholesalers, retailers, peripheral companies, including leather companies, importers
3. Research methodologies: Face-to-face interviews, post-mail surveys, literature research, including the search of statistical data by governmental agencies and industry organizations

DEFINITION of Shoes and Footwear

Shoes and footwear in this research are the shoes and footwear products in Trade Statistics and Industry Statistics, including leather shoes, rubber shoes, chemical shoes and sandals.

➤ **Key Findings**

- ◆ **The FY 09 market size of shoes and footwear in Japan decreased by 4.4% year-on-year to JPY 1,344.5 billion. The market has declined for consecutive two years of FY 08 and FY09.**

The market size of shoes and footwear in Japan in fiscal 2009 was 1,344.5 billion yen, down 4.4 percent from the previous year based on retail sales value.

Influenced by the world shockwaves from the Lehman Brothers' collapse in the latter half of 2008, personal consumptions, including of “new wealthy group” that had been driven the market, were restrained in the categories of western import brand products and luxury men’s shoes. Due to the decline of the frequency of purchase and the per purchase price, the market size dropped.

Lower price product offering to raise the demands of consumers is also one of the factors that decreased per customer price.

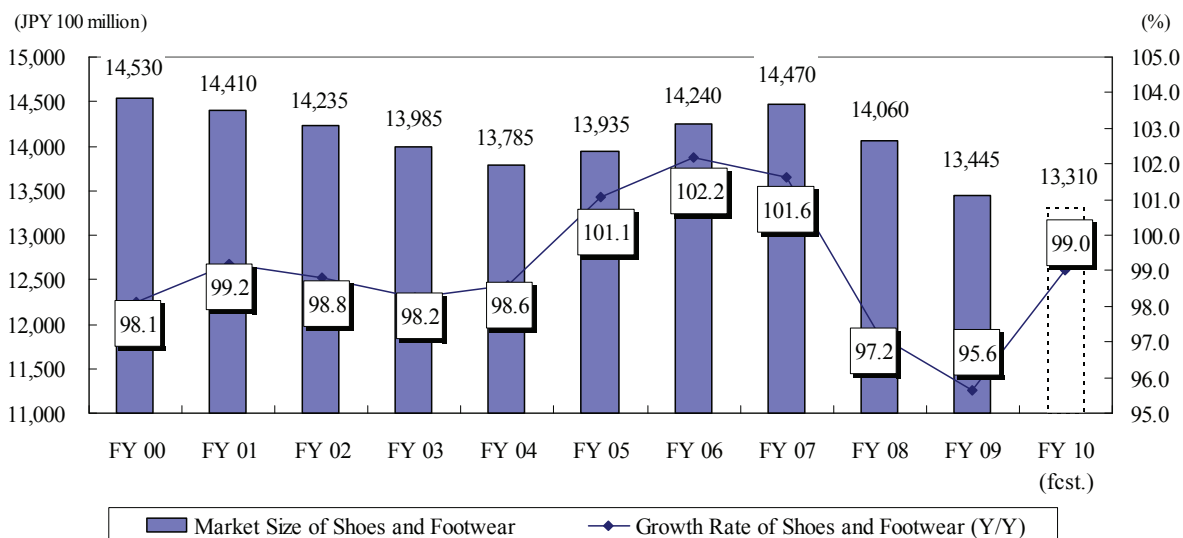
- ◆ **By category, sports shoes and kids’ shoes sold relatively well.**

Looking at the fiscal 2009 market by category, men’s shoes continued to decrease and the sales were down by 6.1 percent from the previous year. women’s shoes decreased by 9.0 percent. On the other hand, sports shoes slightly increased by 0.1 percent, and babies and kids’ shoes increased by 3.4 percent.

- ◆ **Kids’ shoes for running faster are popular.**

Among the babies and kids’ shoes market that is in a healthy condition, “faster-running type (with additional functions to run faster, namely, racing shoes)” for kinds and juniors is particularly strong. The fiscal 2009 market size expanded to 23.8 billion yen, which accounts for 26.4 percent of all babies and kids’ shoes market.

[Market Size of Shoes and Footwear]



(JPY 100 million, %)

	FY 00	FY 01	FY 02	FY 03	FY 04	FY 05	FY 06	FY 07	FY 08	FY 09	FY 10 (fcst.)
Market Size	14,530	14,410	14,235	13,985	13,785	13,935	14,240	14,470	14,060	13,445	13,310
Y/Y	98.1	99.2	98.8	98.2	98.6	101.1	102.2	101.6	97.2	95.6	99.0

Estimated by Yano Research Institute Ltd.

Note: Based on retail sales value.

[Market Size of Shoes and Footwear by Category]

(JPY 100 million, %)

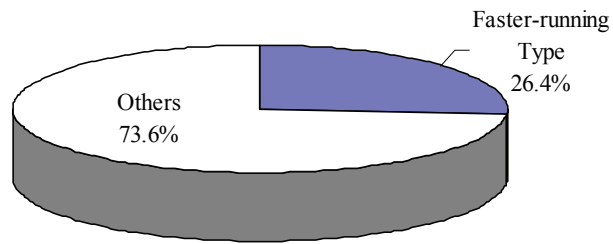
	FY 2004		FY 2005		FY 2006		FY 2007		FY 2008		FY 2009	
	Market Size	Y/Y Share	Market Size	Y/Y Share	Market Size	Y/Y Share	Market Size	Y/Y Share	Market Size	Y/Y Share	Market Size	Y/Y Share
Men's Shoes	2,575	99.6 18.7	2,565	99.6 18.4	2,610	101.8 18.3	2,630	100.8 18.2	2,450	93.2 17.4	2,300	93.9 17.1
Women's Shoes	4,470	97.0 32.4	4,480	100.2 32.1	4,460	99.6 31.3	4,340	97.3 30.0	4,100	94.5 29.2	3,730	91.0 27.7
Sports Shoes	4,480	98.9 32.5	4,570	102.0 32.8	4,730	103.5 33.2	4,850	102.5 33.5	4,930	101.6 35.1	4,935	100.1 36.7
Kids' Shoes	820	100.6 5.9	820	100.0 5.9	840	102.4 5.9	850	101.2 5.9	870	102.4 6.2	900	103.4 6.7
Others	1,440	99.7 10.4	1,500	104.2 10.8	1,600	106.7 11.2	1,800	112.5 12.4	1,710	95.0 12.2	1,580	92.4 11.8
Total	13,785	98.6 100.0	13,935	101.1 100.0	14,240	102.2 100.0	14,470	101.6 100.0	14,060	97.2 100.0	13,445	95.6 100.0

Estimated by Yano Research Institute Ltd.

Note:

1. Based on retail sales value.
2. Sports shoes in this research are the products shipped by sporting goods and shoes & footwear manufacturers as sports shoes.
3. Others include long boots and work shoes.

[Market Share of “Faster-running Type” in Babies and Kids’ Shoes]



Estimated by Yano Research Institute Ltd.

Note:

1. Based on retail sales value.
2. “Faster-running type” shoes are the ones with functions to run faster (namely, racing shoes) among babies and kids shoes.

◆ **Report format:**

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