

JAPAN APPAREL & FASHION MARKET: THE COMPLETE HANDBOOK

Everything you need to export, distribute and market fashion in Japan



A complete map, analysis, manual, handbook and directory for apparel, accessories and footwear markets in Japan

Distributors: Winners & Losers
Highlights and Future Trends
Sogo Shosha: who, what and how much
Bags, Footwear, Sports, Jewellery: Market Size, Key Players, Winners & Losers
300 International Brands: Japan operation & history
Select Shops
TV Shopping
Market Share by Format, Top 100, Top 50, Top 10
Top 50 E-Commerce Apparel Retailers & Trends
Department Stores: Trends, Top 100, Winners & Losers
Market Trends 2013-2018
Top 150 Specialty Chains, Winners & Losers
Shopping Centres: Trends & Top 100

Complete and In-depth

The most complete and thorough analysis of the Japanese apparel & fashion market ever published. This is the only report of its kind and the perfect way to get a clear panoramic view of how the market is laid out, the main channels, and the key players and trends in those channels. See the opportunities and competition, the route to market and expansion, weak points and potential partners.

Japan Apparel & Fashion Market has been designed for a minimum 5 year self-life, with in-depth analysis by sector, providing complete and detailed coverage but still with clear markers to guide, and snapshot overviews to navigate by. If you are already selling in Japan or planning to, investing or advising, Japan Apparel & Fashion Market has all the intelligence needed to get the job done.

Key Questions Answered

Japan is a million piece puzzle, how does it fit together?

Graphical maps and analysis of market structure, key segments within, who owns what and where the power is. Clear overview of how the disparate segments fit together, where the value is. Market share by channel, for top 100, winners and losers over the last decade and more.

What will be the key trends impacting my business in the next five years?

Analysis of current and future trends organised by channel, product category and segment, market value. Impact of international competition, consumption tax increase, wealth inequality, ageing population, single households. Market changes wrought by price competition, marketing, distribution systems, M&A, store brands, e-commerce. Shifts in consumption due to incomes, value perception, life choices, social pressures.

What are the key channels for fashion and apparel?

- Maps and charts of apparel and fashion distribution by positioning and channel, size, value, share and growth.
- Overviews of each format, covering background, ownership, operations, characteristics.

- Key trends by format: growth, operations, target markets, strategies, M&A, market share, problems & solutions, impact on other channels.

Who are the key players in wholesale and retail?

Identify potential partners, suppliers, competitors, investment targets and clients and their strengths and weaknesses:

- Trading firms, distributors and apparel firms: snapshot overviews, key roles, skills and weaknesses. Key trends by type. Profiles on all leading players and rankings with sales, profits and web address.
- Retailers: Split by format and premium or mass market positioning. Profiles on all key players, target markets, strengths and weaknesses.
- International brands and retailers: profiles on key retailers plus listing of 300 brands and retailers by date of entry to Japan, initial entry method and current operation.
- Rankings (sales, profits, web address, stores, locations) for top 100 department stores, by apparel, by accessories, by area. Ranking of top 150 specialty chains. Top 50 online. Rankings in bags, footwear, sports, underwear and jewellery. And more.

The report helps you to

- Understand where your brand or store fits, the competition and opportunities
- Explain the market and its huge potential to head offices, investors and clients using graphical summaries, rankings and analysis
- Find partners, suppliers, competitors, clients, and investment opportunities through key player profiles and rankings
- Stimulate ideas and new directions from staff and colleagues through the report's analysis of segments and key players
- Plan for the future using historical data, market forecasts, and current & future trends
- Quickly look up key data on sectors and players anytime using indexes

Rankings by Channel include sales and profits for quick identification of key players

Rank	Company	Location	Apparel Sales Ymn	YoY %	Total Sales Ymn	YoY %	Ratio %	Website
1	Daimaru Mitsukoshi	Osaka	236,207	+2	543,530	0.8	40.1	http://www.daimaru-mitsukoshi.com
2	Isetan Mitsukoshi	Tokyo	240,608	-18	637,826	-1.4	37.7	http://www.ishimtsu.co.jp
3	Sogo-Setbu	Tokyo	235,236	-20	817,927	-2.0	28.8	http://www.sogo-setbu.co.jp
4	Takashimaya	Osaka	214,750	-29	684,215	-2.0	31.4	http://www.takashimaya.co.jp
5	Maru	Tokyo	197,455	1.4	412,408	1.5	47.9	http://www.0101manjgroup.co.jp
6	Hankyu-Hanshin	Osaka	126,647	5.2	373,903	7.1	33.9	http://www.h3b-retailing.co.jp
7	Kintetsu	Osaka	85,436	-29	269,338	-2.3	31.7	http://www.kintetsu.co.jp
8	Tokyo	Tokyo	86,818	-34	196,942	-3.1	20.0	http://www.tokyo-dept.co.jp
9	Tobu	Tokyo	44,926	-21	149,210	-4.7	30.1	http://www.tobu-dept.co.jp
10	Odakyu	Tokyo	43,977	-39	144,643	-2.6	30.4	http://www.odakyu-dept.co.jp
11	Iwataya-Mitsukoshi	Fukuoka	42,835	-	113,619	-	37.7	http://www.iwataya-mitsukoshi.co.jp
12	JR Tokai Takashimaya	Nagoya	40,880	3.7	104,002	4.3	39.3	http://www.jr-takashimaya.co.jp
13	JR West Isetan	Kyoto	37,042	54.3	95,593	49.2	38.7	http://www.wj-i-setan.co.jp
14	Teramaya	Osakaya	36,024	-28	105,538	-2.9	34.8	http://www.teramaya.co.jp
15	Koto	Tokyo	32,317	-15	92,955	-0.7	35.8	http://www.kotonet.com
16	Sapporo Maru Mitsukoshi	Sapporo	24,719	-0.5	65,945	-2.9	37.5	http://www.maru-imai.jp
17	Ibutsuya	Kokura (Fukuoka)	23,584	-3.3	65,308	-2.9	36.1	http://www.ibutsuya.co.jp
18	Daimaru Hikata	Fukuoka	22,072	-10.0	60,715	-8.9	36.4	http://www.daimaru.co.jp

Company Profiles reveal strengths and weaknesses and highlight the ones to watch

Mash Style Lab
Main type chain in the small fashion chain in FY2011 of ¥1.7 billion. Its main fashion chain is Siretsu, which has a similar target to Cocco Company's Earth, Moon & Stars offering natural style fashions for 30s women but with a slightly heavier image which the designer, Karam Kujirami, defines as Street Formal.

Pal
Ambitious Osaka-based apparel firm targeting teenagers and 20s women, which grew up operating franchise stores for major brands like Armani but then moved into retailing in 2000. Bought New Club in 2002 and this, and is emerging as a diversified apparel group with rapid growth in recent years.

Rig Group Holdings
Sales declined by ¥10 billion to just ¥17 billion between 2009-2010 despite investment in new stores for this traditional womenwear retailer centred around Nagoya. It focuses on the young women's market where competition is intense but has tried stores and remains dependent on wholesalers for supply, so poor profitability. Launched new SC chain CDO and Biance in the last few years. It also entered the men's women's market with the Marine chain. Sales rose slightly in FY2011 thanks to new stores.

Saganmi
A serious retailer including jewellery and fur, that is part of the Uryu Group. Also heavy real estate investments. Sales fell from ¥71 billion in 1998 to ¥105 billion in 2004 but later climbed again through diversification. Signed Araki Bank in 2002, and launched premium chains Orange House and

Overviews of each key segment in apparel distribution for quick absorption

Even when watching TV people are still multi-tasking, with 68% saying they browse mail and the web on their mobile phones or tablets.

Online shopping while in the streets will be especially big in Japan because shopping remains the number one leisure activity.

Non-store the growth channel
eRetail sales show the more of non-store retailing growth, expanding 25 times in the past 10 years, but there is limited data on the true size of the non-store market. The leading non-store trade associations, the Japan Direct Marketing Association (JDMA), surveys its members annually but this survey suffers from many problems, notably a small sample drawn from willing respondents, and including only firms that actively sought to participate.

Despite the flaws, JDMA statistics show an industry in constant growth over the past 10 years - even in 2009 when most other retail sectors really struggled for the non-store sector growth rates simply slowed instead. JDMA estimates that non-store retailing broke ¥5.09 trillion in 2011, roughly 19% of total retail sales, more than double that of 2001.

Although this is the commonly quoted figure, it is lower than other industry estimates. This is because JDMA's been close to half that of the sector total in the past 10 years. JDMA itself suggests that its members, most of whom started as traditional catalogue marketers, grew sales by a respectable 49% in 2011, but non-member sales jumped 17% for the second consecutive year.

As a result, JDMA members' share of the total market has dropped from 83.5% in 2001 to just 63.3% in 2011. Major firms such as Rakuten, Super Shop Channel, JALDI, QIC and Start Today are members - but many online-only firms are not, notably Amazon Japan, which would account for well over 10% of JDMA's total industry sales.

The more traditional nature of the business of many JDMA members means that the association's estimates almost certainly understate the size of online sales and

Thorough analysis combined with clear charts for fast absorption and in-depth understanding

has helped to offset the largest public debt in the world, currently standing at 100% GDP in 2010. Japan owned 18.7% of the world's private financial assets. In 2011, 68 of the Fortune 500 companies were based in Japan.

For the past 10 years, Japan has been affected by price deflation, with prices in 2010 almost 4% below 1989 and continuing to fall. Current government policy is to boost inflation to 2%.

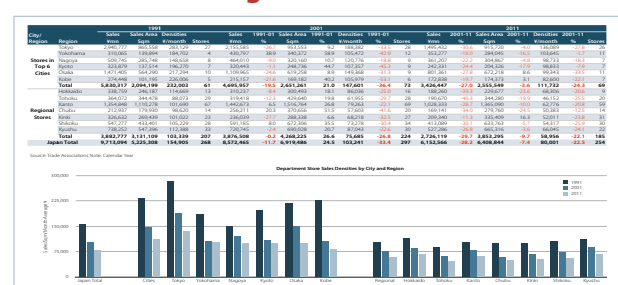
Many firms have cut salaries, which in turn has led to further drops in demand. Companies will be reluctant to raise wages until they see a clear recovery in demand.

Reason why so many overseas companies have been successful in the past three decades and why many will continue to find success

Consumption: Spending data/income/incomes
Disposable income and expenditures have fallen dramatically since 1990, even more so when adjusted for price inflation. Although overall Japan has seen deflation since 2000, with the average change in prices to 2012 -0.28%, both average household monthly income and expenditure have fallen further, by 3.4% and 2.3% respectively.

Japanese continue to save a large chunk of their income, although savings rates have varied significantly in recent years. Since 1990, average monthly savings have never dipped below 18% of disposable income per month for two person, working households. On average 18.3% of monthly disposable incomes have gone into savings since 1990.

Market Structure Analysis to identify regional and channel strengths and weaknesses



Directories of companies by sector and channel including web address

Rank	Company	Type	Sales Ymn	YoY %	Stores	Website
1	Uniqlo	Casual	600,148	+0.9	843	http://www.uniqlo.com/jp/
2	Shimamura	Casual	463,157	6.0	1,707	http://www.shimamura.gr.jp
3	World*	General	275,461	9.1	-	http://www.world.co.jp
4	Onward Holdings**	General	190,227	-1.0	-	http://www.onward-hd.co.jp
5	Aoyama Shoji	Mens	171,726	5.8	824	http://www.aoyama-syouji.co.jp
6	Ryohin Keikaku	General	149,385	3.2	372	http://www.muji.net
7	Xebio	Sports	133,015	7.8	444	http://www.xebio.co.jp
8	Nishimatsuya Chain	Kids	119,814	1.6	808	http://www.24028.jp
9	Point	Casual	115,058	8.7	821	http://point.co.jp
10	TSI Holdings**	General	106,400	-	-	http://www.tsi-holdings.com
11	United Arrows	Select	95,406	12.1	170	http://www.united-arrows.co.jp
12	Aoki Holdings	Mens	94,252	9.4	531	http://www.aoki-hd.co.jp
13	Gap Japan**	Casual	90,000	5.4	160	http://www.gap.co.jp
14	Pal Group	General	85,360	10.3	652	http://palgroup.co.jp
15	Right On	Casual	80,666	-7.3	479	http://right-on.co.jp
16	Konaka	Mens	64,807	-5.2	394	http://www.konaka.co.jp
17	Five Foxes**	General	63,270	-14.5	-	http://www.fivefoxes.co.jp
18	Sanki	General	59,109	6.2	206	http://www.fi-sanki.co.jp
19	Baycrews	Select	58,336	7.1	190	http://www.baycrews.co.jp
20	Cross Company	Womens	55,989	36.5	427	http://www.crosscompany.co.jp

Graphical snapshots for quick overviews of key themes and markets

Analysis of performance of leading firms by channel and segment

Target market was an increasingly affluent and rapidly expanding middle class.

Original Beams and Shippa stores stocked almost entirely imported brands. Over the years these chains acquired reputation for their astute buying skills. As a result, the press themselves began to convey serious brand value. Fashion credible retailers. Select shop chains were also quick to realise the value of brand marketing - the chain branding for all the leading companies is some of the best in Japanese retailing.

The natural consequence of this was the development of own branded apparel ranges, usually more basic diluted styles of popular international brands. The merits of own brands in terms of both gross margins and supply chain management, and their popularity with consumers, led to a gradual erosion in the sales share of imported brands.

In effect, select shop chains today operate largely as SPA chains, that is, designing and selling their own product, with imported products are used to entice customers through the door and to create a high quality and fashionable image for the chain through fashion magazine PR.

A real success story
The success of the select shop chains is clear. Beams spawned United Arrows, set up by former Beams staff, followed by Baycrews, Tomsonland and more recently

Brand and company index for quick and easy referencing day to day

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JapanConsuming: the leading source of intelligence on Japanese retail & consumers markets

Who is JapanConsuming?

JapanConsuming is a company dedicated to delivering relevant, practical research on Japanese consumer markets to international brands, retailers and investors. We do this through regular monthly and annual reports as well as custom research services.

Expert Analysis

To provide the best in-depth market intelligence, we built a team that combines business insight and market analysis skills to deliver research that is clear, insightful and above all usable. Over the last 14 years, our clients and subscribers have consistently commented on how our data and analysis has led directly to new opportunities whether in sales, marketing, investment or M&A.

Coverage And Quality

We cover all consumer sectors. We research retail trends, product developments and launches, consumer buying trends, financial performance and company strategies. We are constantly monitoring retail and consumer markets and trends and invest heavily in new resources.

Real Experience

Because we've been there, working in distribution, building brands, selling to retailers, dealing with trading companies, we know what intelligence our clients need to expand their business. Some companies spend years accumulating this knowledge after beginning opera-

tions in Japan. Our clients are able to draw on JC experience and resources to save years in undertaking their own research on Japan.

How do we do this?

JapanConsuming uses many means to gather and collate data. We add our unique experience and perspective to every report we write.

- News gathering by JC research team
- Company interviews
- Newspaper and Trade journal monitoring
- Meetings with retail buyers, traders marketers
- Industry Data Analysis
- Retail Store Visits
- Analysis of overseas company feedback
- Extensive network of contacts across the industry

Clients

Below is a sample of companies that buy our research:

Adidas Polo Ralph Lauren Gap L'Oreal Walt Disney
LVMH Amazon Tiffany UK Trade Ministry French Trade
Ministry Godiva KPMG Giorgio Armani Tesco Richemont
Costco Fidelity Investments The Body Shop Max
Factor Liz Claiborne Estee Lauder Levi Strauss McKinsey
Pernod Ricard Nike Timberland Reebok Zara
(Inditex) Cath Kidston

JapanConsuming Monthly Report

As well as indepth sector and market reports, JapanConsuming publishes a monthly report on Japanese consumer markets. Now in its 14th year, *JapanConsuming* is read by most consumer goods brands and retailers, as well as investors, governments and strategic consultants to keep up to date and gain insight on this key market. Each issue includes all the latest news with insightful analysis on key events, as well as sales data from leading specialty chains, department stores, GMS chains and shopping centres.

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