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

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.

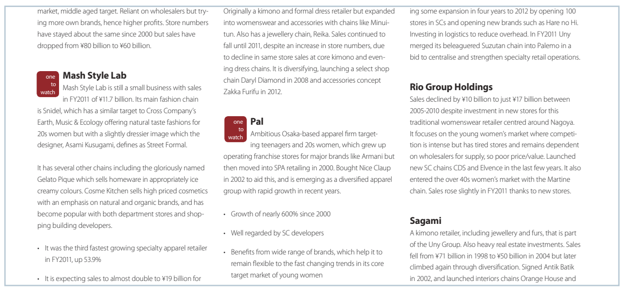
The report helps you to

- 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

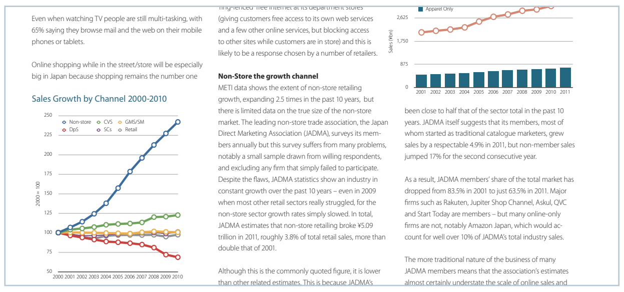
Rankings by Channel include sales and profits for quick identification of key players

Rank	Company	Location	Apparel Sales ¥mn	YonY %	Total Sales ¥mn	YonY %	Ratio %	Website
1	Daimaru-Matsuzakaya	Osaka	258,207	-0.2	643,530	0.8	40.1	http://www.daimaru-matsuzakaya.com
2	Isetan-Mitsukoshi	Tokyo	240,608	-1.6	637,826	-1.4	37.7	http://www.imhds.co.jp
3	Sogo-Seibu	Tokyo	235,236	-2.0	817,927	-2.0	28.8	http://www.sogo-seibu.co.jp
4	Takashimaya	Osaka	214,750	-2.9	684,215	-2.0	31.4	http://www.takashimaya.co.jp
5	Marui	Tokyo	197,455	1.4	412,408	1.5	47.9	http://www.0101maruigroup.co.jp
6	Hankyu-Hanshin	Osaka	126,647	5.2	373,903	7.1	33.9	http://www.h2o-retailing.co.jp
7	Kintetsu	Osaka	85,436	-2.9	269,338	-2.3	31.7	http://www.kintetsu.co.jp
8	Tokyu	Tokyo	56,818	-3.4	196,042	-3.1	29.0	http://www.tokyu-dept.co.jp
9	Tobu	Tokyo	44,926	-7.1	149,210	-4.7	30.1	http://www.tobu-dept.jp
10	Odakyu	Tokyo	43,977	-3.9	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.wjr-isetan.co.jp
14	Tenmaya	Okayama	36,024	-2.8	103,538	-2.9	34.8	http://www.tenmaya.co.jp
15	Keio	Tokyo	33,317	-1.5	92,935	-0.7	35.8	http://www.keionet.com
16	Sapporo Marui Mitsukoshi	Sapporo	24,719	-0.5	65,945	-2.9	37.5	http://www.marui-imai.jp
17	Izutsuya	Kokura (Kyushu)	23,584	-3.3	65,308	-2.9	36.1	http://www.izutsuya.co.jp
18	Daimaru Hakata	Fukuoka	22,072	-10.0	60,715	-8.9	36.4	http://www.daimaru.co.jp

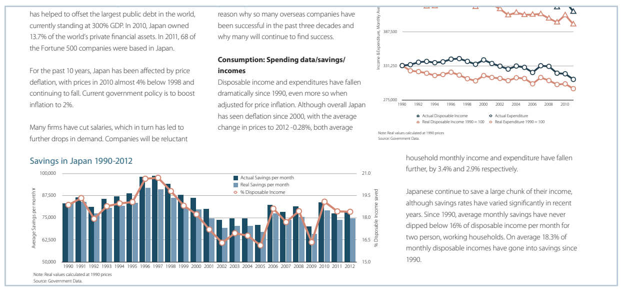
Company Profiles reveal strengths and weaknesses and highlight the ones to watch



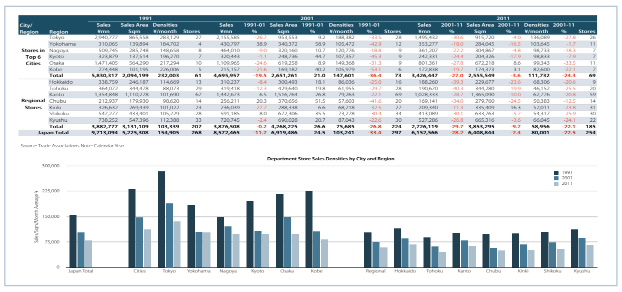
Overviews of each key segment in apparel distribution for quick absorption



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



Market Structure Analysis to identify regional and channel strengths and weaknesses

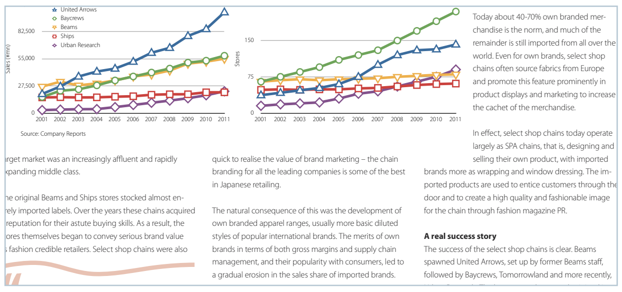


Directories of companies by sector and channel including web address

Rank	Company	Type	Sales ¥mn	YonY %	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	190,527	-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	803	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	58,836	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



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

Table of Contents (Report Length: 330 pages and over 150 charts)

Background on consumer markets
Trends in Consumer Markets to 2020
Geography
Climate
Transport and Infrastructure
Demographic profile & trends
Japanese Economy and Global Role
Distribution System Overview
Retailing

Report Highlights
Apparel Market Size
Apparel Market Structure
Apparel Market Share by Format
Wholesale market
Apparel Retailing
Non-Apparel Goods
Shopping Centres
International apparel brands and retailers

Current & Future Trends
Summary of Current & Future Trends

Current & Future Trends in detail
Market Growth: Apparel market stabilise
Market Growth: Better Prospects
Trends by Market Segment
Trends by Retail Format
Trading Companies, Distributors and Wholesalers
Shopping Locations
Other Retail Trends
Consumers

Market Overview
Market Value
Market Structure
Market Structure
Wholesale
Retailers
Market Share by Format

Top 100 Apparel Retailers

Distributors & Wholesalers
Distributors & Wholesalers Overview
Fashion Distribution
General and Specialist Trading Companies
Apparel Groups
Importer-Distributors
Pure Wholesalers
Agents
Buying Offices

Sogo Shosha (General Trading Companies)
Background
Sogo Shosha: Trends
Key Sogo Shosha Firms

Sogo Shosha: Directory

Importer-Distributors
Background
Recent Trends
Key Importer-Distributors

Apparel Conglomerates
Background
Apparel Conglomerates: Key Trends
Key Apparel Conglomerates

Distributors & Wholesalers Directory

Retailers Overview
Types of Apparel Retailer
Retail Sales by Format
The Biggest Apparel Retailers
Top 100 Apparel retailers

Retailers Overview: Directory

Premium Apparel Retailers
Background on Premium Retailers

Premium Retailers: Department Stores
Department Stores: Background
Fewer stores, declining sales, a lot more space
Sales densities collapse
Department stores today

Department Stores: Trends
Becoming relevant again
Merchandising
Expansion
Impact of department store restructuring on fashion distribution
Future: fewer stores, more retailing

Department Stores: Key Players
Department Stores: varied performance

Department Store directory

Premium Retailers: Select shops
Select Shops: Background
Select Shops: Trends
Select Shops Key Players

Mass Market Apparel Retailers
Overview of Mass Market Retailers

Mass Market: GMS
GMS: Background
GMS: Trends
GMS: Key players

Mass Market: Specialty Retailers
Specialty Retailers: Background

Specialty Retailers: Trends
Specialty growth slows as SC development declines
Seeking more profit and sales per store
Sources of new growth inside and outside Japan

Specialty Retailers: Key Players
Womenswear
Menswear
Casual Apparel
Childrenswear

Specialty Retailers Directory

Shopping Centres
Shopping Centre Ascendancy
Types of Shopping Centre
SCs a growing power in apparel retailing
The top 100 SCs in 2011
Leading Developers
Outlet Malls
Future SC Development

Non-Apparel
Footwear
Overview
Footwear manufacturing and wholesale market
Key Trends
Footwear Retail Market
Key Retailers

Sports
Overview
Sportswear Manufacturers and Wholesalers
Sports retailing
Main Players

Underwear & Hosiery
Overview
Key Players

Bags & Accessories
Overview
Bag Manufacturers
Retail Market
International brands

Jewellery
Overview
Jewellery Manufacturers and Wholesalers
Jewellery Retailers

Non-Store Apparel Retailing
Overview

Non-store retailing trends

E-commerce
Overview
Key Players in E-Commerce
Department Stores Online
Social Fashions

Catalogue-based firms
Overview
Key Trends
Main Players

TV Shopping
Overview
Trends in TV Shopping
Key TV Shopping Companies

International Retailers and Brands in Japan
Overview
Profiles of Key International Apparel Retailers

Company and Brand Index

Plus over 150 charts including:
Summary of Japanese Apparel & Accessory Market
Apparel, Accessory & Footwear Retail Sales 1991-2011
Apparel & Accessories Market Value by Retail Format 09-11
Average Annual Apparel Expenditure per Household 91-11
Share of Apparel Consumption by Apparel Type 2006-2011
Apparel Price Change across clothing types 1991-2011
Apparel & Accessory Retail Sales by Value vs Unit Shipments
Imports by Unit and as a % of apparel market 1991-2011
Apparel Market Structure & Value, Wholesale Structure, Value & Share by Retail Format, Value & Share of Imports vs Domestic Shipments, Market Share
Apparel, Accessories & Footwear Market Share by Channel
Key Importer-Distributors: Sales, Brands and Web Address
Key Apparel Conglomerates: Sales, Profits and Key Brands
Key M&A Activity by Apparel Conglomerates 2003-2011
Department Stores vs Shopping Centres by Sales 1991-2011
Department Store, GMS Apparel Sales 1991-2011
Top 150 specialty chains
Specialty Chains by Sales Densities 2011
Top 20 Fastest Growing Specialty Apparel Retailers between 2001-2011
Top 10 Specialty Chains in 2001, 2006, 2011
Top 5 Select Shop Retailers by Sales and Stores 2001-2011
Top 100 department stores by sales and by region
Top 50 department stores by accessory sales
Top 50 department stores by apparel sales
Top GMS Chains by Apparel Sales 2011
Top 75 womenswear manufacturers and wholesalers
Top 45 menswear manufacturers and wholesalers
Top 100 Retailers of Apparel by format, apparel sales, total
Top 100 Apparel Retailers: Market Share by Format 2011
Top 50 womenswear retailers by sales
Top 40 menswear retailers by sales
Shopping Centre Growth 2001-2011 by Number and Space
Shopping Centres by Type 2011
Shopping Centre Sales and Share of Retail 1985-2011
Top Shopping Centres by Sales Densities 2011
Outlet Malls in Japan 2012
Top 15 Footwear Retailers by Sales 2011
Top 3 Footwear Retailers Sales and Profit Growth 2003-2011
Top 20 Sports Manufacturers and Wholesalers 2011
Top 15 Sports Retailers 2011
Top 15 Underwear & Hosiery Firms 2011
Leading Bag & Accessory Manufacturers and Wholesalers 2011
Bag Retail Market 1996-2011
Leading Bag & Accessory Retailers with Sales above ¥1 billion
Jewellery Retail Market Value 2000-2011
Leading Jewellery Manufacturers 2011: Sales and Web Address
Leading Jewellery Retailers 2011: Sales and Web Address
Non-store Retail Sales Actual & Forecast and as Percentage of Total 2007-2015
E-commerce Total & Apparel Sales 2007-2011
E-commerce Sales by Product Category and Service Type 2007-2011
Top 60 e-commerce vendors of apparel by apparel sales
Leading Catalogue Firms 2011: Sales, Op. Profit and Web
TV Shopping Sales vs Total Non-Store, 2000-2012
Leading TV Shopping Firms 2011
Foreign Brands in Japan: Popular through the ages
Overseas Retailers & Brands in Japan by Year of Registration & Cumulative Total
Overseas Retailers & Brands since 1954 by current Model/Status
List of Japan Entry of 315 Brands and Retailers by Year of Entry, Category, Type of Operation on Entry and Current Operation 1954-2012

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 operations 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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