EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

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DISCLAIMER

SOURCES

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Childrenswear in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium baby gifts maintain value growth for childrenswear
In the era of fewer babies: Targeting parents
In the era of fewer babies: Targeting older children

PROSPECTS AND OPPORTUNITIES

A continued fall in volume sales expected in the forecast period
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Gifting is an area of opportunity

CATEGORY DATA

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2023 DEVELOPMENTS
While face masks see an exceptional decline, hats/caps, belts, and scarves support overall value growth.
Apparel accessories have become an important part of fashion.
Luxury brands attract younger generations through young and famous ambassadors.

PROSPECTS AND OPPORTUNITIES
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Face masks set to maintain a high level of sales even though COVID-19 has faded.
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Menswear in Japan

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Outdoor products attract younger consumers.
Formalwear and businesswear in a paradigm shift.

PROSPECTS AND OPPORTUNITIES
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KEY DATA FINDINGS

2023 DEVELOPMENTS
Polarisation in womenswear
Fast fashion giants in Japan: GU and Shimamura
Sailing through the sea of inflation

PROSPECTS AND OPPORTUNITIES
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Collaboration to strengthen brands and increase unit prices
Genderless/unisex expands to large and small brands

CATEGORY DATA
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Jeans in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS
Positive growth for two consecutive years
Casual and Y2K trends underpin growth
Premium jeans brands make careful collaborations

PROSPECTS AND OPPORTUNITIES
Little movement expected for jeans in the forecast period
Kaihara leads jeans brands to premiumise
Sustainability through water reduction and upcycling

CATEGORY DATA
2023 DEVELOPMENTS

No recovery seen from a hard decline in 2020, for multiple reasons
FamilyMart expands its product range
Numerous collaborations in socks aim to appeal to new consumers

PROSPECTS AND OPPORTUNITIES

Offering additional value will be necessary to halt the decline
November 11 is “Socks Day” in Japan, but has little impact
New value added with femtech

CATEGORY DATA

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Hosiery in Japan

KEY DATA FINDINGS

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PROSPECTS AND OPPORTUNITIES

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Footwear in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued growth for footwear in 2023, thanks to the pandemic fading
The alignment of apparel and footwear – an opportunity to expand
Hyper-heated resale market cools down

PROSPECTS AND OPPORTUNITIES

On differentiates itself with a fusion of functionality and premiumisation
Aiming to improve wellness for the feet
Recovery footwear begins to show a presence

CATEGORY DATA

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Sportswear in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Full recovery from the pandemic in 2023, supported by sports events
Sportswear expanding to daily fashion
Baseball, basketball and rugby heat up the nation and sales of sportswear

PROSPECTS AND OPPORTUNITIES

Healthy growth set to continue
Outdoor brands to collaborate with luxury brands
Women as a target for sales and empowerment

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