

# Market Outlook of Linen in Japan for Sustainable Growth

World Linen Forum by CELC  
17th~18th September 2018

**ASABO**

Japan Linen & Ramie Association

Congratulations !  
The success of World Linen Forum in Paris.





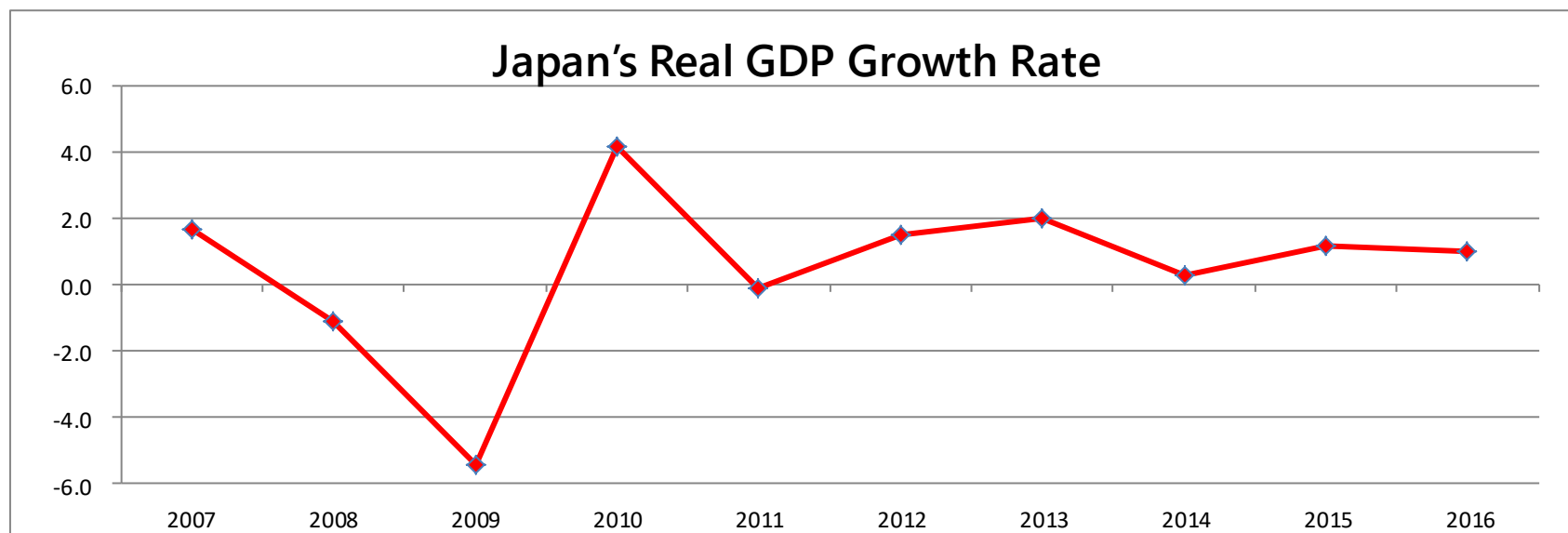




# Economic Indicators in Japan

Source: IMF

| (%Change from previous year) |         | Real GDP Growth Rate |      |      |      |      |      |      |      |      |      |
|------------------------------|---------|----------------------|------|------|------|------|------|------|------|------|------|
|                              |         | 2007                 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
| ①                            | U.S.    | 1.8                  | -0.3 | -2.8 | 2.5  | 1.6  | 2.2  | 1.7  | 2.4  | 2.6  | 2.6  |
| ②                            | China   | 14.2                 | 9.6  | 9.2  | 10.6 | 9.5  | 7.9  | 7.8  | 7.3  | 6.9  | 6.7  |
| ③                            | Japan   | 1.7                  | -1.1 | -5.4 | 4.2  | -0.1 | 1.5  | 2.0  | 0.3  | 1.2  | 1.0  |
| ④                            | Germany | 3.4                  | 0.8  | -5.6 | 4.0  | 3.7  | 0.7  | 0.6  | 1.6  | 1.5  | 1.8  |
| ⑤                            | U.K.    | 2.6                  | -0.6 | -4.3 | 1.9  | 1.5  | 1.3  | 1.9  | 3.1  | 2.2  | 1.8  |
| ⑥                            | France  | 2.4                  | 0.2  | -2.9 | 2.0  | 2.1  | 0.2  | 0.6  | 0.6  | 1.3  | 1.2  |
| ⑦                            | India   | 9.8                  | 3.9  | 8.5  | 10.3 | 6.6  | 5.5  | 6.5  | 7.2  | 7.9  | 6.8  |
| ⑧                            | Italy   | 1.5                  | -1.1 | -5.5 | 1.7  | 0.6  | -2.8 | -1.7 | 0.1  | 0.8  | 0.9  |



# 国内繊維産業の概況①

## Overview of Domestic Textile Industry (1)

- 国内生産の減少により、国内の繊維事業所数、製造品出荷額とも、1991年比で約1/4に減少。

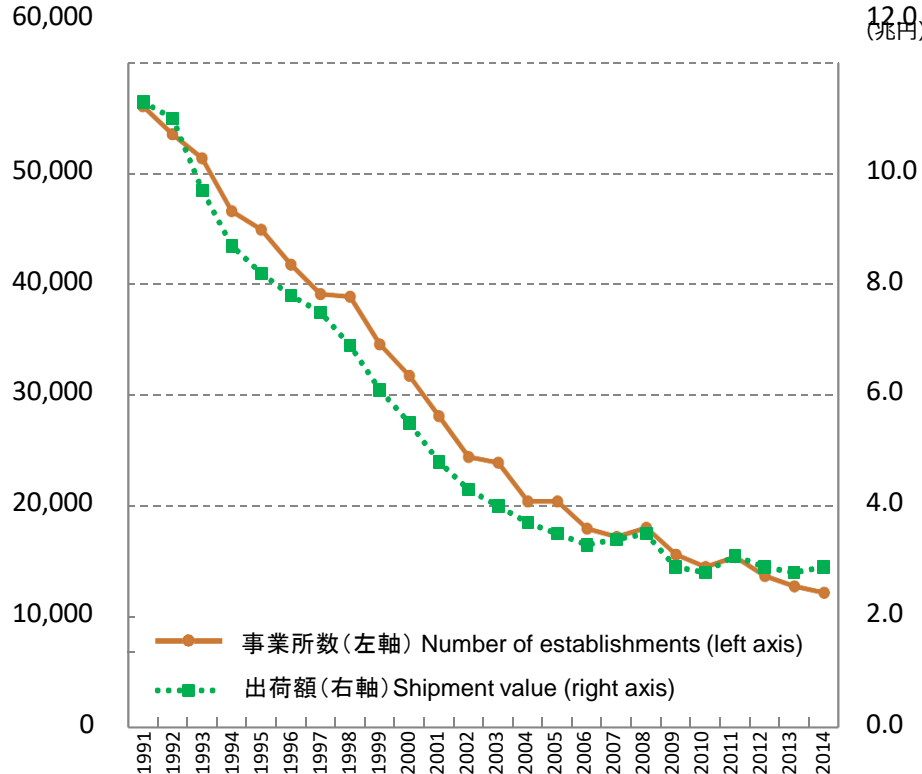
Both the number of domestic textile establishments and the shipment value of manufactured product decreased to about 1/4 of those in 1991 due to the decrease in domestic production.

- 国内市場における輸入浸透率は増加し続けており、2016年には97.3%まで増加。

The import penetration rate in the domestic market has been increasing continuously.  
It increased to 97.3% in 2016.

### 国内繊維産業の事業所数及び製造品出荷額

Number of domestic textile establishments and shipment value of manufactured products (× trillion yen)

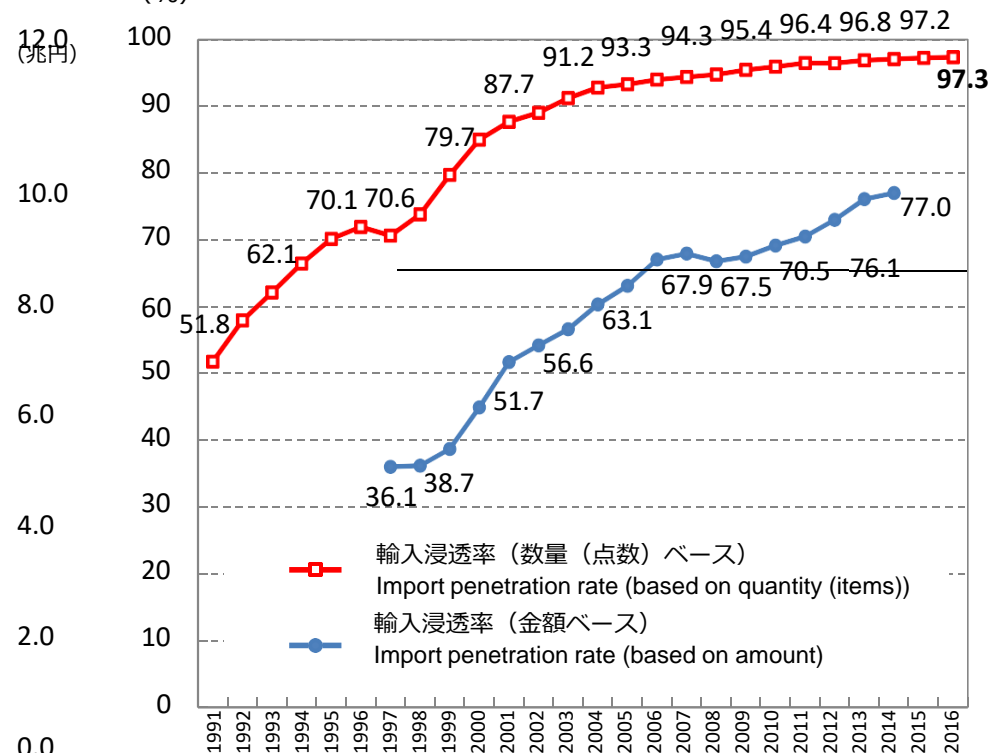


出典：経済産業省「工業統計表」

Source: *Census of Manufactures* of the Ministry of Economy, Trade and Industry

### 国内市場における衣類の輸入浸透率

Import penetration rate of clothing in domestic market



出典：経済産業省「工業統計表」、総務省「センサス統計」、財務省  
日本繊維輸入組合「日本のアパレル 市場と輸入品概況」  
Source: *Census of Manufactures* of the Ministry of Economy, Trade and Industry, *Census Statistics* of the Ministry of Internal Affairs and Communications, Ministry of Finance  
*Japan's Apparel Market and Overview of Imports* of the Japan Textiles Importer's Association

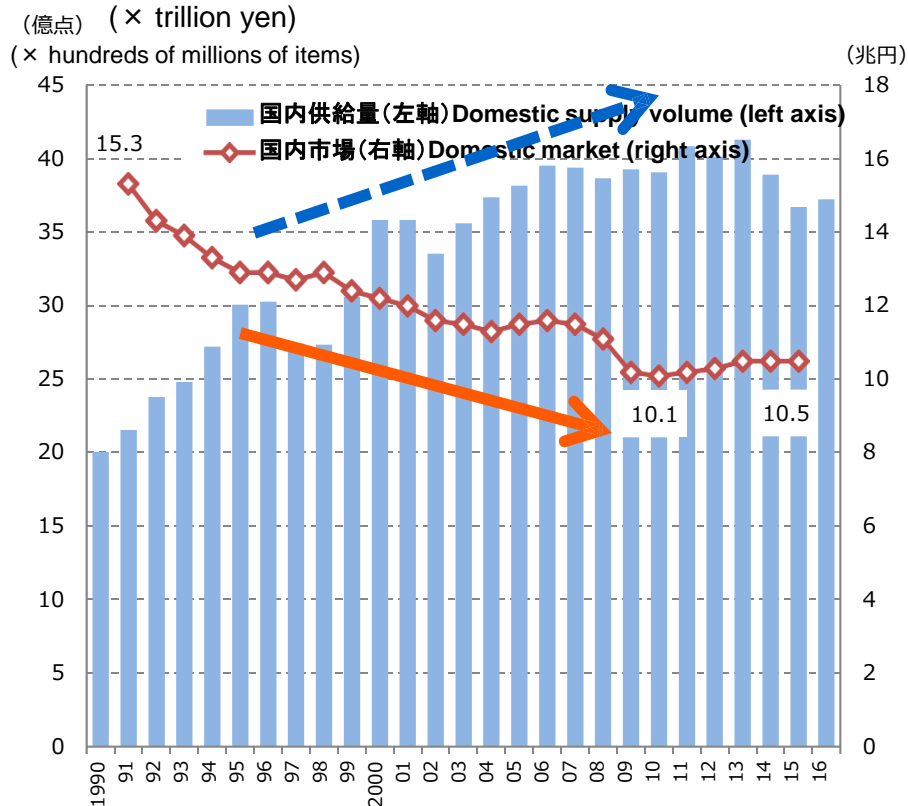
# 国内繊維産業の概況②

## Overview of Domestic Textile Industry (2)

- 国内のアパレル市場規模は、バブル期の15兆円から10兆円程度に減少する一方、供給量は20億点から40億点程度へと、ほぼ倍増している。  
The supply volume has nearly doubled from about 2 billion to about 4 billion, while the domestic apparel market size has decreased from 15 trillion yen in the bubble economy period to about 10 trillion yen.
- 衣料品の購入単価および輸入単価は、1991年を基準に6割前後の水準に下落。  
The purchase unit price per clothing item and import unit price per clothing item fell to the level of around 60% on the basis of 1991.

### 国内アパレル供給量・市場規模の推移

Trends of domestic apparel supply and market size



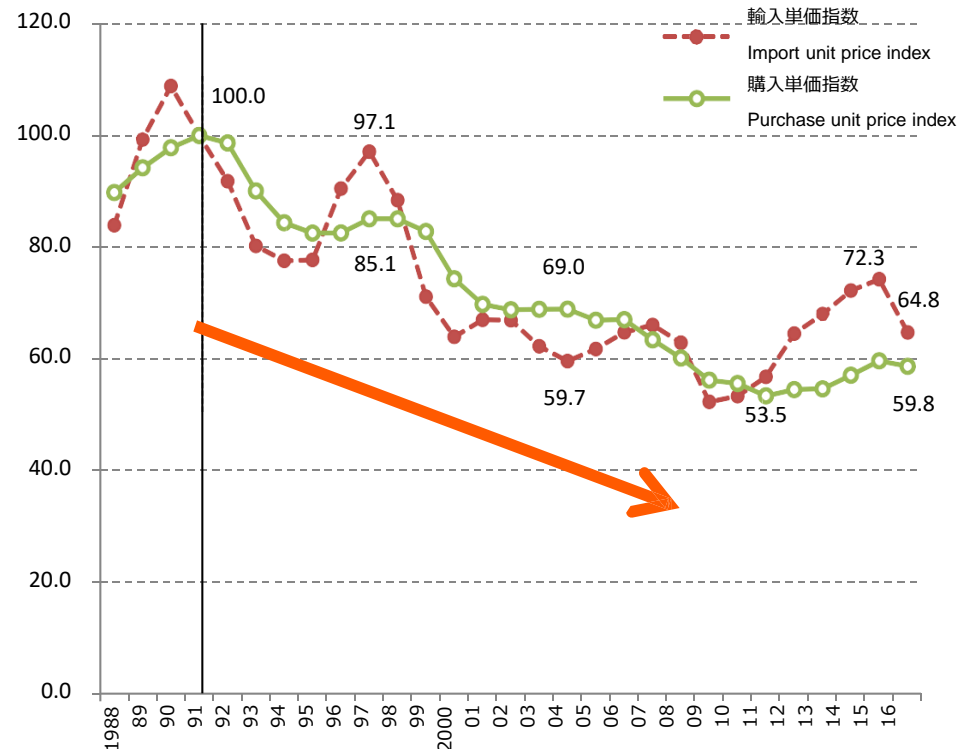
出典：(国内供給量)経済産業省「生産動態統計」、財務省「貿易統計」

(国内市場)矢野経済研究所「繊維白書」

Source: (Domestic supply volume) *Dynamic Statistics of Production* of the Ministry of Economy, Trade and Industry, *Foreign Trade Statistics* of the Ministry of Finance  
(Domestic Market) Textile White Paper, Yano Research Institute

### 衣料品購入単価・輸入単価の推移

Trends of purchase unit price per clothing item and import unit price per clothing item



出典：購入単価=総務省「家計調査」、輸入単価=財務省「貿易統計」よりそれぞれ算出 ※1991年を「100」とする

Source: The purchase unit price was calculated according to *Family Income and Expenditure* of the Ministry of Internal Affairs and Communications, and the import unit price was calculated according to *Foreign Trade Statistics* of the Ministry of Finance.

\* In each case, the value of 1991 was set as 100.



## 国内繊維産業の概況③

### Overview of Domestic Textile Industry (3)

- 長年の厳しい国際競争の中で、生き残った素材メーカー等は相応に強いものづくりの地力を有し、織物輸出額は世界的に見ても高い水準にある。

Amid the challenging international competition of many years, the material manufacturers that have survived have reasonably strong manufacturing grounds, and their export value of textiles is at a high level on a worldwide scale.

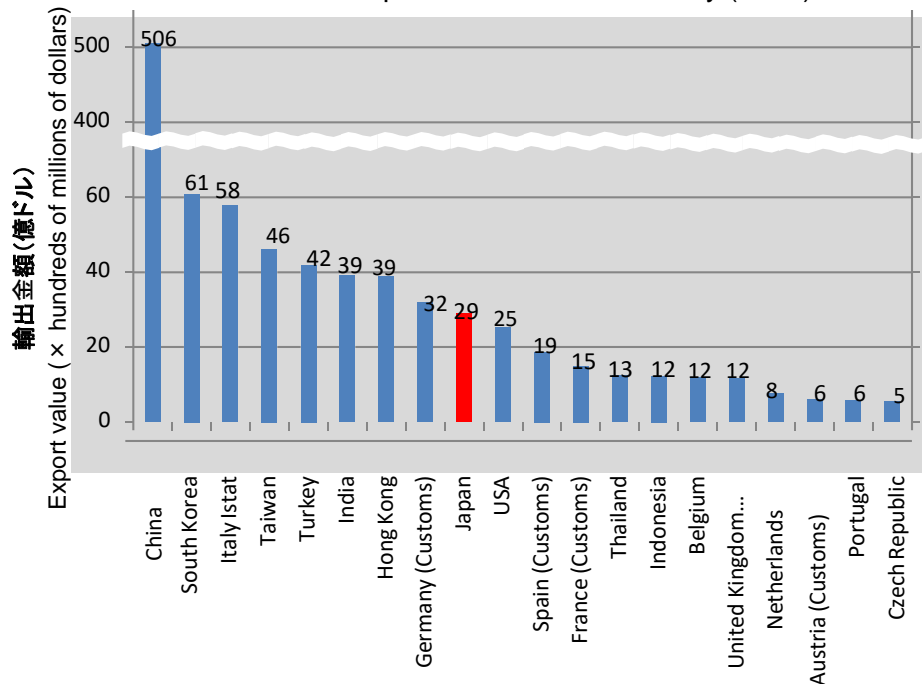
- プルミエールビジョン(※)をはじめとした海外の生地見本市に多数の生地メーカーが出展するなど、日本の生地は世界でも高く評価されている。

Japanese textiles are highly evaluated in the world, and accordingly, many Japanese textile manufacturers exhibit their textiles at overseas textile fairs, including Première Vision(\*).

#### 日本の繊維業界の強み①

##### ～各国織物輸出額(2016)～

Strengths of Japanese textile industry (1)  
Textile export value of each country (2016)

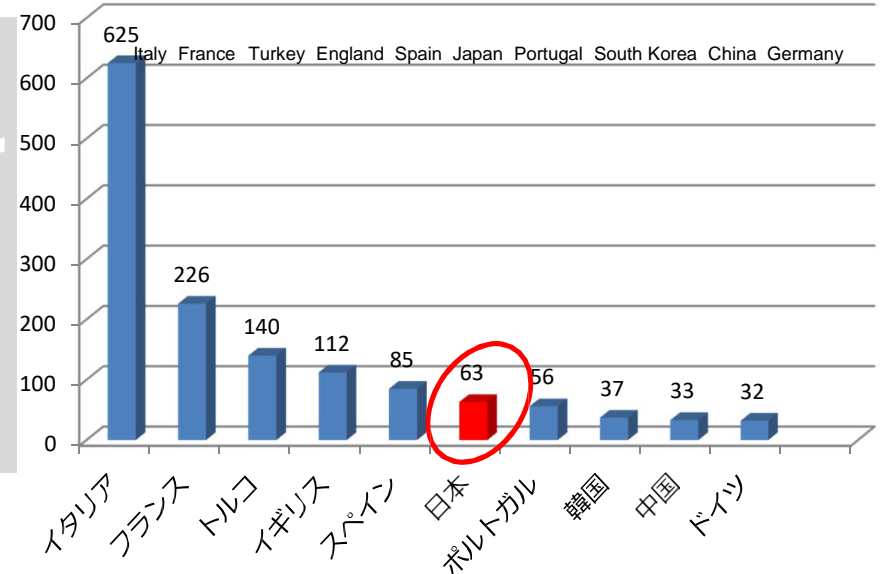


出典: Global Trade Atlas  
Source: Global Trade Atlas

#### 日本の繊維業界の強み②

##### ～プルミエールビジョン国別出展数(2017年2月)～

Strengths of Japanese textile industry (2)  
Number of exhibits at Première Vision per country (February 2017)



# Market Size



## Apparel industry in Japan

**10.5 trillion yen**

95.5 billion USD (1\$ = 110 yen)

80.7 billion EURO (1€ = 130 yen)

**2016**

**15.3 trillion yen**

148.5 billion USD (1\$ = 110 yen)

133.0 billion EURO (1€ = 130 yen)

**1991**

27 years ago



## Each sector in Apparel

Men's clothing

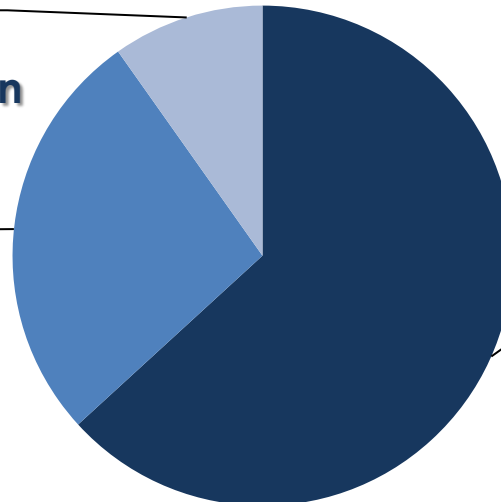
9.8%

**911 billion Yen**

Others (child,  
home fashion)

27.0%

**2.5 trillion Yen**



**TOTAL 9.3 trillion yen**

Women's clothing

63.2%

**5.9 trillion Yen**



# Outlook of the Final Linen Market in Japan

factor



Due to still continuing of deflation, particularly textile industry, & consumer's declining buying power for clothing, apparel market is still weakness.

factor



Under such market environment for the apparel companies, as for the fiber material of clothing, only Linen and linen mixed are increasing considerably except all other fiber materials.



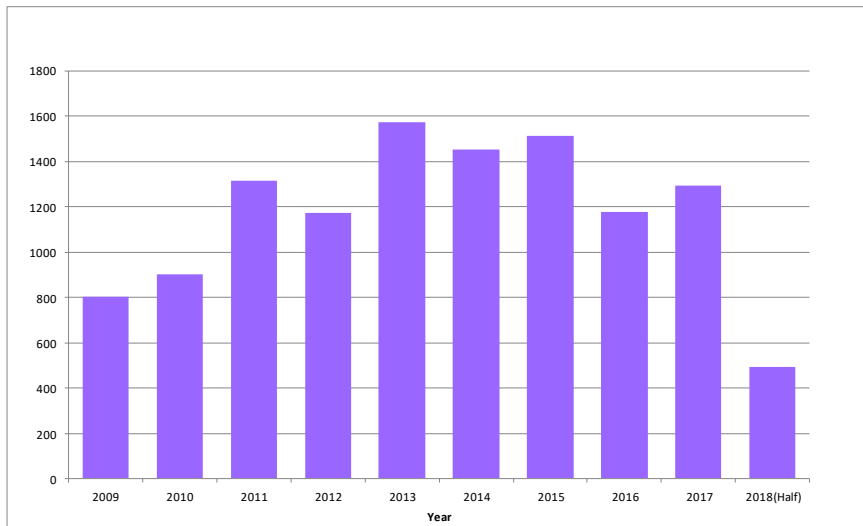
**Japanese major apparel makers still have to reduce stores & employees.**

**On the other hand, mail-order & internet business are increasing dramatically.**

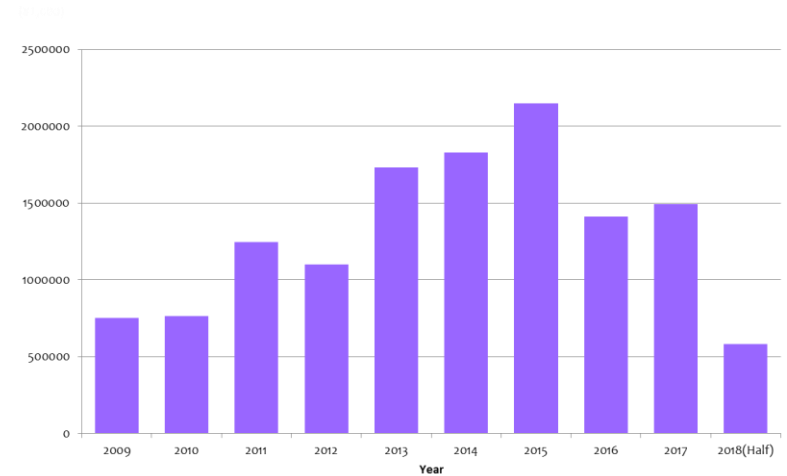
# Imports into Japan of Linen yarn

## 2007 - 2018

Quantity: ton



Value : ¥1000



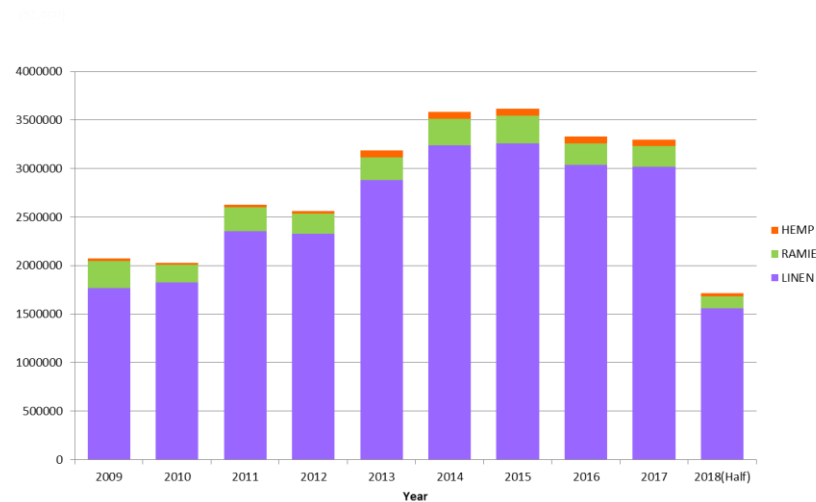
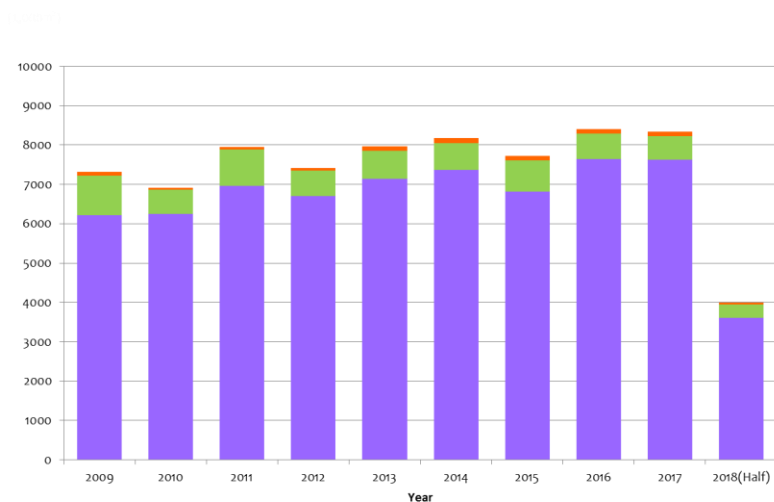
Source : Trade Statistics of Japan by Ministry of Finance



# Imports into Japan of ASA(Linen,Ramie,Hemp)fabrics 2009 - 2018

Quantity: 1000m<sup>2</sup>

Value : ¥1000



# Fabric Report of Premiere Vision Paris

(13-15 Feb. 2018)

会社名 : トスコ株式会社

Company Name : TOSCO CO., LTD.

## 会社紹介 Company Profile

Established : 5 Mar. 1918

Head Office : Chuo-ku,Tokyo,Japan Tel. 03-3667-3321 Fax. 03-3667-3325

Japan Plant : Mihara-shi,Hiroshima,Japan China Plant : Kunshan City,Jiangsu,China

Activities : Manufacturing, processing of Linen, Hemp and Ramie fibers, President : Keiji Nemoto (Director of ASABO)

## 理念 Company Vision

また、縄文時代から日本人は麻(苧麻、大麻)を手で紡ぎ、生活文化に取り入れてまいりました。

Also, Japanese people has taken fibers from RAMIE and HEMP and spun by hand from Japanese ancient Jomon period and has incorporated that into our daily life.

トスコは、縦糸と緯糸の織りなすハーモニーにより、明日のライフスタイルをより豊かにしていく、新たな価値を紡いでまいります。  
By harmony of warps and wefts in weaving using such fibers, TOSCO has been creating new values in present -day, and it also enriches the people's future life style.



## 主要設備

Main facilities : 4インチ乾式紡績設備一式(三原工場、昆山トスコ)  
4-inch dry spinning unit at Mihara in Japan and kunshan in China

中国リネン湿式紡績メーカーとの取組み  
and cooperate with Chinese wet spinning linen factory.



- ラミー糸は主に独自に開発した細繊維種原料を使用  
Ramie yarns : Originally breed improved fine ramie fibers and organic ramie to our ramie yarns.

- 認証

Certification: GOTS (Organic Ramie)【Certificate No.C812367GOTS-03.2011】  
ISO14001 【Certificate No. EC13J0043】

- プルミエールビジョンパリへの出展 Exhibition of Premiere Vision Paris

- i) 初出展 2015年2月より、毎年SSのみ出展

The first exhibition on Feb. 2015, exhibit only Spring & Summer Exhibition every year

- ii) 出展動機 The motive to exhibit

\* 日本にも古来より定着した麻文化があり、メイドインジャパンの丁寧にももの作りした麻のテキスタイルを世界に紹介したい。

To introduce and spread our textile culture of Ramie and Hemp from ancient times and its modernized high-quality textiles of Japan made to the world.

- iii) 2018年プリミエールビジョン パリ Premiere Vision Paris in 2018

- ◆ 概要 : FORUMに展示された素材は次の5点 Summary 5 pieces displayed by FORUM :

①Linen denim ②Pigment denim ③High count Ramie yarn ④Ramie stretch textile ⑤ Organic Ramie jersey  
ブース展示サンプルは105点のファブリック 105 pieces displayed at the booth

①Linen fabric 43pcs ②Ramie fabric 56pcs ③Ramie/Linen fabric 4pcs ④Japanese paper yarn fabric 2pcs

- ◆ 来場者等 : 来場会社数 約100社 Visitors etc around 100 companies

: サンプル要求件数 The number of demanded Fabric samples are 200~300 cases

Photographs  
around  
our booth



会社名 : 株式会社ケンランド  
Company Name KENLAND INC.

## 概要 About us

リネン・ヘンプ(フラット、サーキュラー、ワープ、レグ)を日々進化させ、衣料、バス、キッチン、ベッド周りなどのライフスタイルグッズ、医療介護用品などの生活用品などの企画・生産

KENLAND INC. creates linen & hemp with knitting (flat, circular, warp, leg) and evolves day by day and commercializes lifestyle goods such as clothing, bathroom, kitchen, bedroom etc, and household goods such as medical nursing care products etc.

## 活動内容 Our activity

～草木染めの実践販売～*Natural Dye*

30年来社長大沼秀一自身が進めてきたプロジェクト。

年間約10-15種の植物やワイン・日本酒などを選び、そこから抽出した染料による染色

インディゴは、日本の伝統阿波スクモを使う作家(数社)とのコラボレーション(ジャパングループ)

This is the project that the director of KENLAND INC., Shuichi Onuma, has been promoting for 30 years.

We select about 10-15 kinds of plants, wine and Japanese sake each year and dye linen with dye extracted from these items and commercialize it.

Our Indigo-dye collection collaborates with Japanese artists (several companies) using Japanese traditional Awa Sukumo. The item that is sold is Japan Blue.

～神戸のシューズメーカーとのコラボレーション～

シープ、シカなど、軽く柔らかな素材(皮)をセレクトし、靴の内装にできる限りリネンを使用しています。靴底とインソールに二重に高反発材を使用し、足に優しい靴を作りました。

シューフィッターが測定し、インソールの高さを調整し、よりカスタマイズされた靴をご提案致します

Collaboration with shoe manufacturer located at Kobe in Japan.

We selected light weight and soft material (leather) such as sheep, deer and used linen as much as possible for the interior of the shoes. Also, we used double ply high repulsion material for the sole and insole and made shoes that were gentle to the feet.

The shoe fitter individually measures the size of each foot and also adjusts the height of the insole.



# KENLAND's MOVIE

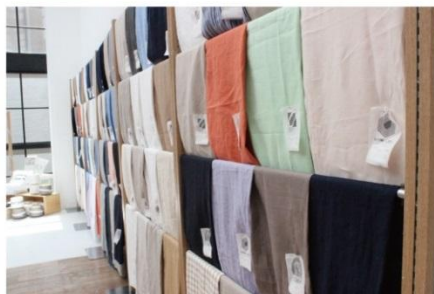
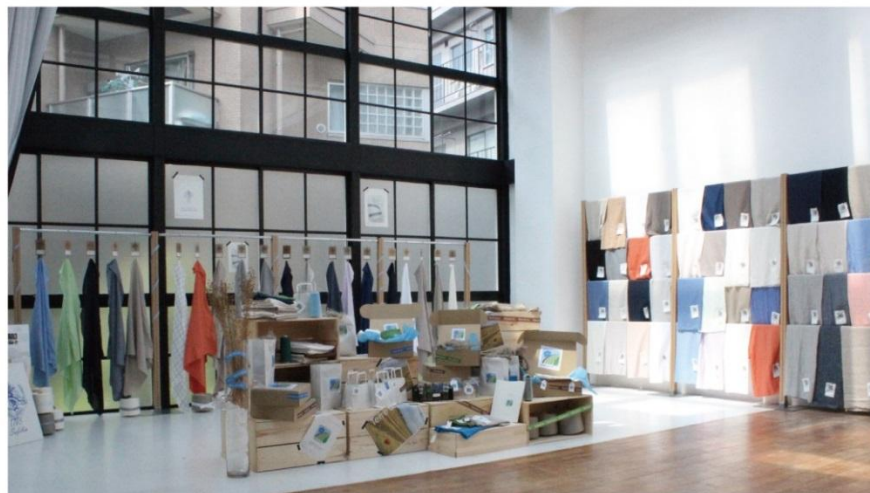
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# TEIKOKU SEN-I CO., LTD.

## Our activity

EXHIBITION OF TEISEN 18-19 April 2018

at GAIENMAE









## Our activity





# Strength of the Linen market in Japan

-  Characteristic weather condition, hot & humid summer season.
-  Tradition of wearing vegetable fiber preference of luxury textile & fashion
-  Preference of luxury textile & fashion
-  Still big consumer market for Linen
-  Favorite of French & Italian fashion
-  By government-led campaign the "Cool Biz" style as power-saving

# **Toward the FUTURE**

## **For the sustainability growth of Linen**



To differentiate from common commodity & FMCG (fast moving consumer goods), LINEN is a Gold fiber !



By using Japanese woven & knitted high-technology.  
still alive excellent weavers & knitters in major source



To grasp the opportunity !  
From shrunk domestic market to expanded global market by  
Government subsidy & it's several support



To yield the synergy effect !  
Premiere Vision, Milano Unica & Shanghai Intertextile.



To collaborate and yield the synergy effect among ASABO,  
CELC and CBLFTA !



To use the real traceability brand !  
Genuine brand label from CELC “European Flax”

**Thank you for your attention !**