

A Business History of the Japanese Fashion Industry since 1950

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Over the last two decades, the Japanese apparel industry has lost its competitiveness after experiencing a period of fast growth from the postwar years to the early 1990s. In international literature in social sciences, most scholars offer ethnic-based explanations of fashion in Japan, stressing some specificities such as street fashion or star designers in Paris. Our research, however, argues that such views are biased and cannot explain the current lack of competitiveness of the Japanese apparel industry. Using the concept of the fashion system and following a business history-oriented approach, we offer a new interpretation of the emergence of Western clothing and fashion in Japan during the second part of the twentieth century. It demonstrates that the characteristics of the Japanese fashion system lie in a focus on the issues of production and technology, which led both to an extreme segmentation of the domestic market and to weaker brands.

研究目的

The objective of this research was to offer a new understanding of the causes of the decline of the Japanese apparel industry, based on an approach of global business history and using the concept of “fashion system”, developed by Western business historians and sociologists. We have addressed the following research questions:

- ・Who are the most important intermediaries of the Japanese fashion system?
- ・What are their relations with apparel companies and retailers (department stores)?
- ・How can intermediaries support the globalization of Japanese apparel companies?

By answering these questions, we give a new explanation of the lost competitiveness

of Japanese apparel companies. Second, we contribute to the internationalization of academic research on fashion and apparel, by connecting Japanese and foreign academic scholars.

概 要

Our research has demonstrated the emergence and formation of a Western clothing industry and fashion system in Japan between 1945 and 1990. By looking at a broad range of enterprises and actors, it has emphasized that the specificities of the Japanese fashion industry are far from the ethnic-based explanations that fashion scholars have traditionally offered. Street fashion and star designers in Paris are only anecdotal episodes, not full expressions of the industry’s true nature.

The Japanese fashion system must be understood first in the context of a cultural and industrial transplantation. Making Western clothes in Japan after WWII was a new activity that required new knowledge. Since the 1970s, the growth of ready-to-wear production, driven by a new segment of apparel companies that mass-produced garments and distributed them through department stores and new sales outlets, led to the decline of handmade clothing by housewives. However, the productive and technological paradigm continued to dominate the apparel industry. Fashion was not (and still is not) considered a creative activity—it was a business based on complex and rational market analysis.

Consequently, the Japanese fashion system appeared and developed during the second part of the twentieth century on the basis of a technological and production paradigm. The interactions between the various enterprises and actors of the system had clear objectives: to enable the design, mass production, and consumption of Western clothes. Unlike fashion systems in France, Italy, or the US, the goal was not to invest in creative activities in order to build strong brands and increase profits through ready-to-wear items and accessories. In Japan, apparel companies showed no interest in working on and co-developing brands with star designers. Designers had to move to Paris or New York to boost their careers and usually ended up pursuing business back to Tokyo as independent small companies positioned in a niche market (creative fashion for wealthy people). Moreover, Japanese apparel companies did not—and could not—diversify toward cosmetics and accessories

because of their different business models and the presence of entry barriers, which were profit-making divisions in Europe, due to their lack of fashion brands.

This difference in the nature of the fashion system explains the lack of strong fashion brands in Japan and the intrinsic weakness of the Japanese apparel industry in the global market. As long as the industry was domestic-oriented in Japan, there was no problem—it still met customers' expectations. When powerful Western brands began entering the Japanese market in the 1990s and sagging consumption in Japan forced apparel companies to shift their attention toward the global market, however, the industry's inherent weaknesses led to a sharp drop-off in competitiveness among apparel companies. In addition, the relationship between apparel companies and department stores has suffered in light of deflationary conditions dating to the 1990s and the resulting shifts in the macro-economic situation, considering that it was difficult for them to get away from familiar surroundings.

Consequently, this research offered a new interpretation of the Japanese apparel industry's decline since the mid-1990s and inability to maintain a competitive edge. The use of the "fashion system" as an analytical tool and the business history approach shed light on the true nature of the Japanese apparel industry. Fashion studies has been a vibrant field in the social sciences for more than two decades, and business historians can contribute to renewing debates and reexamining issues.

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