

# Report of Down and Feathers Market in Japan 2022



**JDFA Japan Down Products  
Corporative Association**

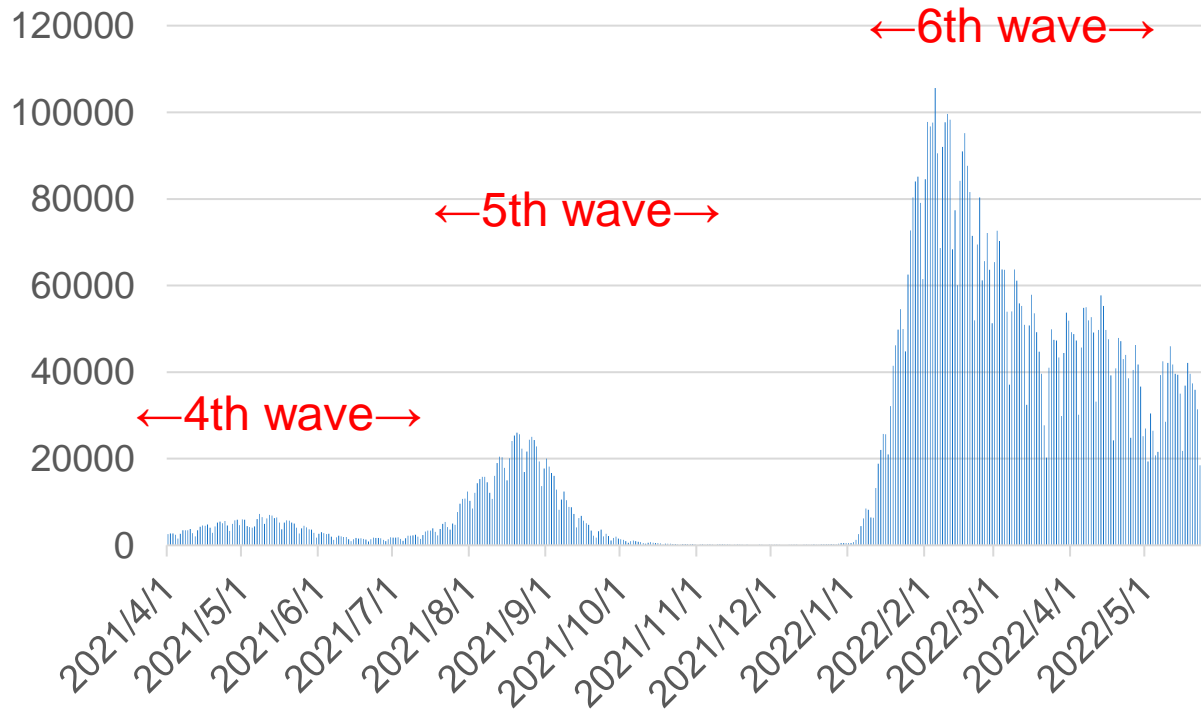
Mr. Satoshi Kataoka

# Covid-19 in Japan 2021/2022

<Post covid-19 6<sup>th</sup> wave in Japan>

Department store and supermarket sales in March 2022  
up 2.9% y/y for all stores,  
seventh consecutive month of y/y growth. (METI MAY 2022)

## New infected person in Japan



# Economy background in Japan 2021/2022

Japan's economy is likely to recover (Bank's view by Bank of Japan Apr 28 2022)

## Latest World Economic Outlook Growth Projections

(real GDP, annual percent change)

	2021	2022	2023
<b>World Output</b>	6.1	3.6	3.6
<b>Advanced Economies</b>	5.2	3.3	2.4
United States	5.7	3.7	2.3
Euro Area	5.3	2.8	2.3
Germany	2.8	2.1	2.7
France	7.0	2.9	1.4
Italy	6.6	2.3	1.7
Spain	5.1	4.8	3.3
Japan	1.6	2.4	2.3
United Kingdom	7.4	3.7	1.2
Canada	4.6	3.9	2.8
Other Advanced Economies	5.0	3.1	3.0
<b>Emerging Market and Developing Economies</b>	6.8	3.8	4.4
Emerging and Developing Asia	7.3	5.4	5.6
China	8.1	4.4	5.1

<https://www.imf.org/en/Publications/WEO/Issues/2022/04/19/world-economic-outlook-april-2022>

## Latest Market Overview in Japan



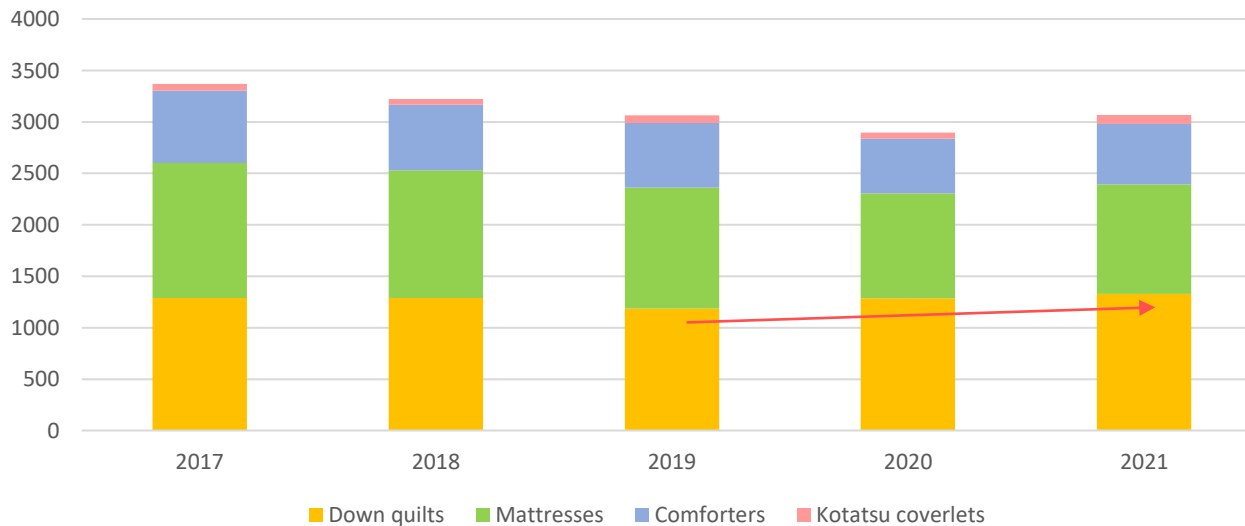
- 1) Production Volume of Down Quilts from 2017 to 2021
- 2) Import of Down Quilts from 2019 to 2021
- 3) Import of Raw Down Materials from 2019 to 2021

# 1) Production Volume of Down Quilts from 2017 to 2021

Volume of Japan products is increasing gradually

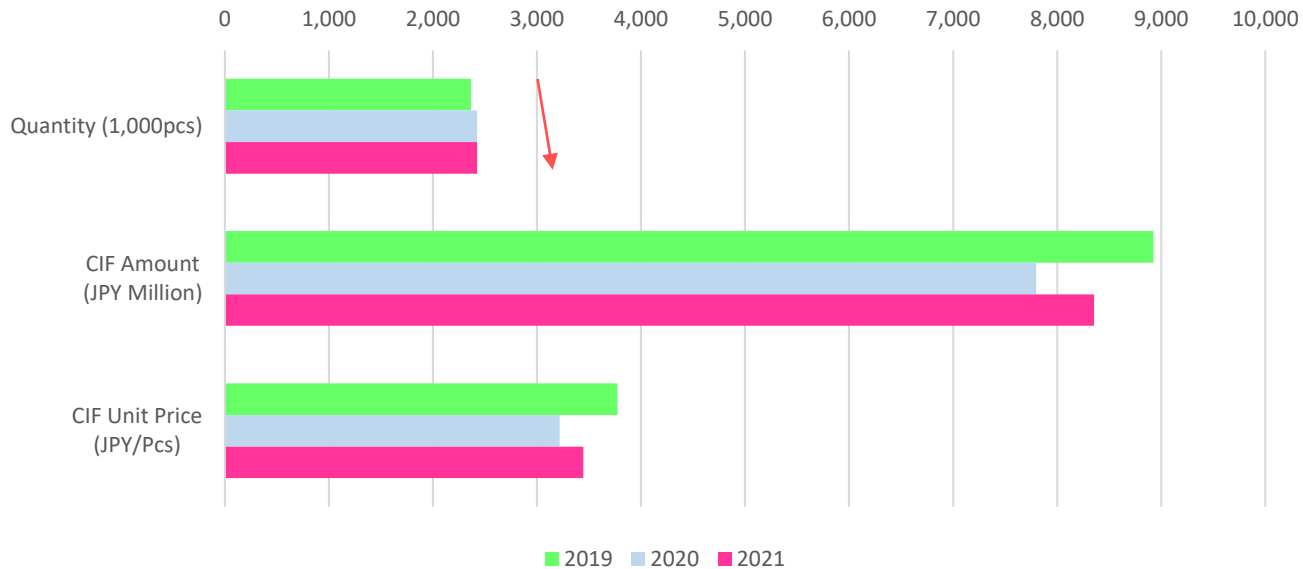
(x 1,000pcs)

Year	Down quilts	Mattresses	Comforters (other than down)	Kotatsu coverlets	Total
2017	1288	1312	704	66	3370
2018	1289	1239	640	55	3223
2019	1187	1173	631	72	3063
2020	1284	1021	531	59	2895
2021	1328	1064	587	89	3068



## 2) Import of Down Quilts from 2019 to 2021

Volume of quilts import is also increasing gradually



	Quantity (1,000pcs)	CIF Amount (JPY Million)	CIF Unit Price (JPY/Pcs)
2019	2,365	8,926	3,775
2020	2,423	7,797	3,217
2021	2,425	8,356	3,446

## 2) - 2 Import of Down Quilts from 2019 to 2021

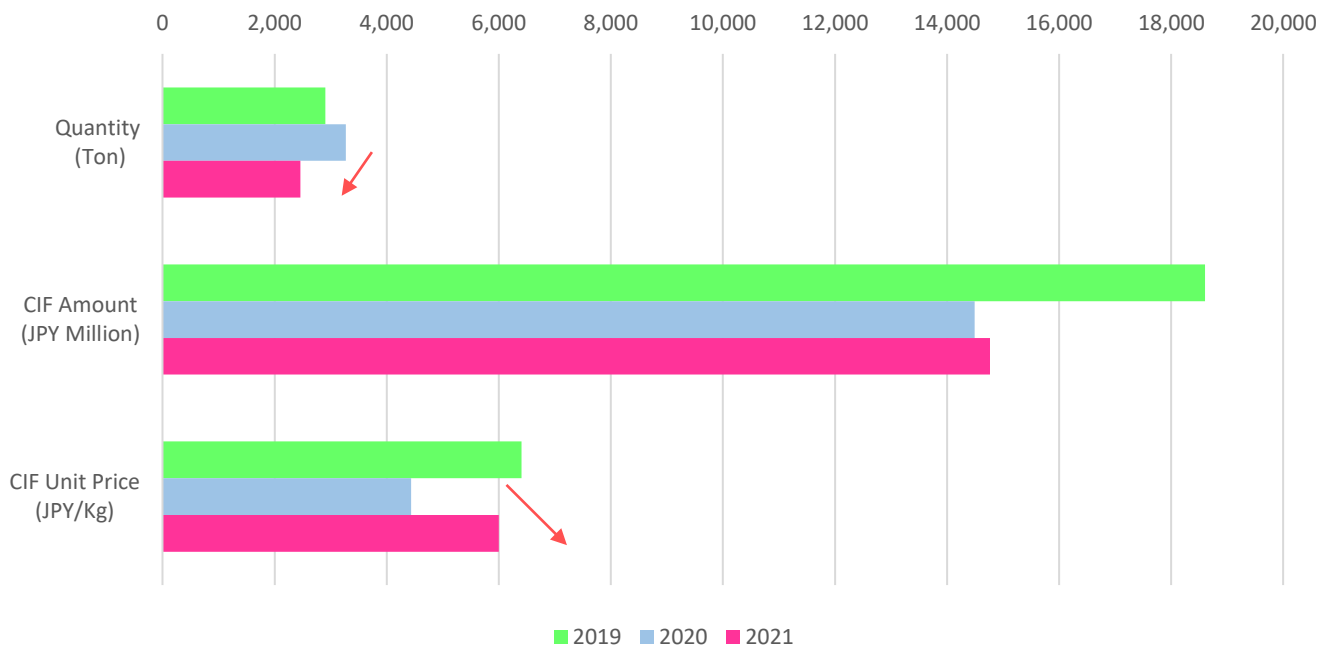
99.3% of import from China+Vietnam

55 : 100 = Japan products : Import (2021)

Country	Quantity(Piece)			CIF Amount(Thousand Yen)			CIF Ave. Unit Price(JPY/Piece)		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
China	2,113,667	1,937,892	2,159,343	7,597,249	5,791,570	7,164,704	3,594	2,989	3,318
Vietnam	229,007	467,705	249,427	799,102	1,609,644	724,021	3,489	3,442	2,903
Germany	7,118	5,201	3,817	283,606	205,500	267,906	39,843	39,512	70,188
USA	5,040	4,644	5,940	49,033	38,237	51,684	9,729	8,234	8,701
Taiwan	0	100	366	0	257	2959	0	2,570	8,085
Denmark	7,676	5,968	4,822	141,547	115,313	108,100	18,440	19,322	22,418
Poland	816	531	9	10,390	7,363	1,833	12,733	13,866	203,667
Switzerland	204	39	56	10,946	1,539	4,219	53,657	39,512	70,188
Finland	333	46	287	24,194	4,319	9,470	72,655	93,891	32,997
Austria	0	0	0	0	0	0	0	0	0
Other	964	1,220	1,142	10,055	23,343	21,351	10,534	19,134	18,696
<b>TOTAL</b>	<b>2,364,825</b>	<b>2,423,346</b>	<b>2,425,209</b>	<b>8,926,122</b>	<b>7,797,085</b>	<b>8,356,247</b>	<b>3,775</b>	<b>3,217</b>	<b>3,446</b>

# 3) Import of Raw Down Materials from 2019 to 2021

Turning point 2020-2021  
(volume down, price up)



	Quantity (Ton)	CIF Amount (JPY Million)	CIF Unit Price (JPY/Kg)
2019	2,904	18,605	6,406
2020	3,268	14,490	4,434
2021	2,461	14,768	6,001



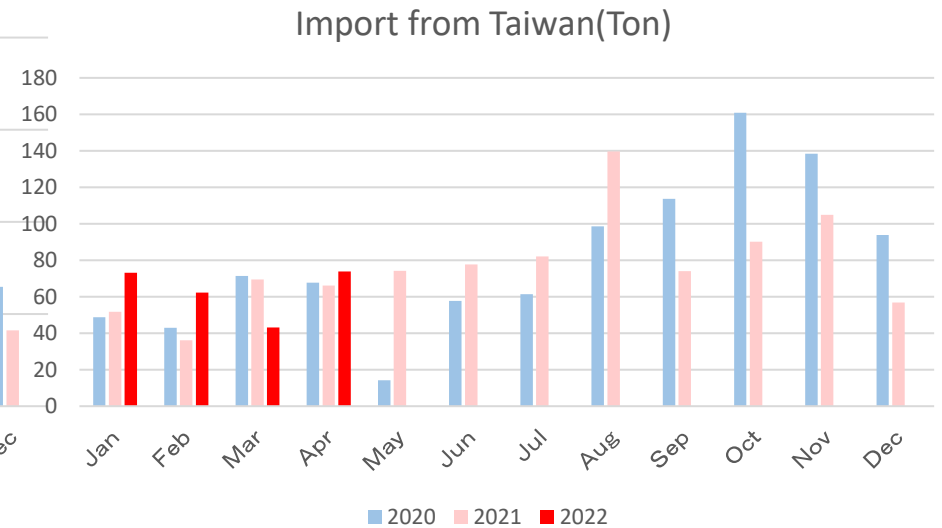
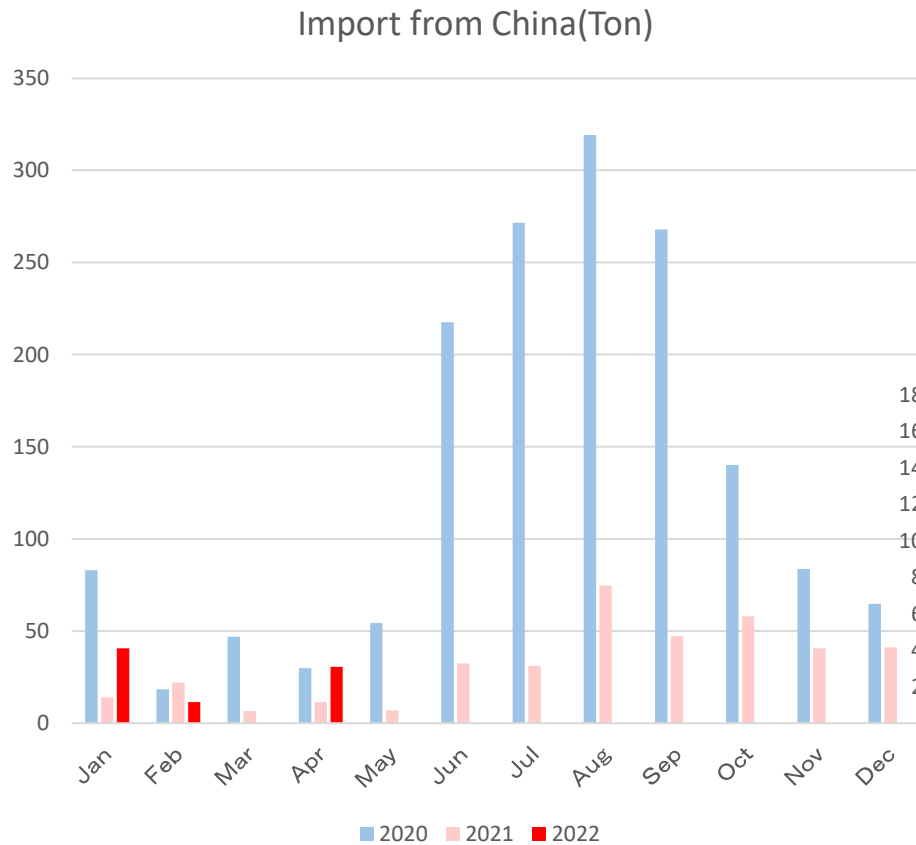
### 3) - 2 Import of Raw Down Materials from 2019 to 2021

Import volume from China dropped drastically

Country	Quantity(Kg)			CIF Amount(Thousand JPY)			CIF Ave. Unit Price(JPY/Kg)		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
China	1,001,790	1,597,819	386,465	5,201,043	5,704,499	2,444,620	5,192	3,570	6,326
Taiwan	823,285	970,033	923,215	3,902,824	3,332,369	4,016,226	4,741	3,435	4,350
Poland	141,325	95,214	146,152	1,790,943	1,187,249	1,479,394	12,673	12,469	10,122
France	179,388	163,680	358,919	1,222,654	936,937	1,712,644	6,816	5,724	14,363
Hungary	244,369	142,322	257,947	2,474,222	1,327,915	2,490,647	10,125	9,330	9,656
Burgaria	112,749	73,086	78,836	721,455	432,696	437,497	6,399	5,920	5,549
Canada	12,040	15,920	48,225	81,582	111,933	203,512	6,776	7,031	4,220
Ukraine	94,966	33,166	45,456	765,488	297,801	315,763	8,061	8,979	6,947
Russia	65,760	37,144	40,855	834,250	455,686	490,189	12,686	12,268	11,998
Spain	54,993	48,288	43,339	357,679	226,853	258,751	6,504	4,698	5,970
Germany	13,939	910	4225	119,285	10,258	60,682	8,558	11,273	14,363
Vietnam	143,540	85,020	116,540	865,100	354,288	592,838	6,027	4,167	5,087
Iceland	700	416	1243	142,538	66,055	206,759	203,626	158,786	166,339
Other	15,454	5,141	9,666	126,015	45,388	58,974	8,154	8,829	6,101
TOTAL	2,904,298	3,268,159	2,461,083	18,605,078	14,489,927	14,768,496	6,406	4,434	6,001

# 3) - 3 Import of Raw Down Materials from 2020 to 2022 Apr

Current situation upto 2022 Apr  
Focus on Import from China and Taiwan



# Challenging year 2022 (potential bottle neck)

Stable demand of down quilts/comforter in Japan



Sufficient supply of down and feather

1. Covid-19 impact

- Primary : reduction in down production
- Secondary: impact to other industry  
(transport etc)

2. Less import from Ukraine/Russia(+East Europe)

3. Higher import price due to weaker yen  
etc..

## Part 2

### Major Initiatives taken by JDFA over the Last year



- 1) JIS Revision
- 2) The Quality Standard for “Recycled Down”

# 1) Revision of "JIS Glossary of terms in feathers"

**<2020>**

**Nov**

**JDFA subscribed JIS revisions with offering by JSA(Japanese Standards Association)**

**<2021>**

**Jan**

**The proposed revisions were adopted**

**Apr – Oct**

**Drafting JIS**

**⇒2 x committee + 4 x project meeting**

**<2021>**

**May**

**JSA declared to government(METI).**

**Autumn - Winter**

**New standard is scheduled to be published**



Translated and Published by  
Japanese Standards Association

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**JIS L 0216** : 2016

(JDPCA/JSA)

**Glossary of terms used in feathers**

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**JIS L 1903** : 2011

(JDPCA/PAJ)

**Testing methods for feathers**

# 1)-2 Contents of JIS Revision

## Revision of Glossary of terms JIS L 0216

No	Item	Main Revision
1	Down	<ul style="list-style-type: none"><li>➤ Least <b>three</b> barbs connected at one point.</li><li>➤ If the length of down is <b>less than 3 mm</b>, it will be residual matter.</li></ul>
2	Down fiber Feather fiber	<ul style="list-style-type: none"><li>➤ If the length of fiber is <b>less than 3 mm</b>, it will be residual matter.</li></ul>
3	<u>landfowl</u> feathers fiber	<ul style="list-style-type: none"><li>➤ Add definition.</li></ul>
4	damaged feather	<ul style="list-style-type: none"><li>➤ Add damage rate.</li></ul>

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## 2) The quality standard for “Recycled Down” by JDFA

- **6 x JDFA TC meetings in 2021**
- **New definition will be implemented mid-2022**
- **Quality standards in three areas**
  - 1. Quilts/Comforter(home use)**
  - 2. Quilts for commercial use(hotel,hospital etc)**
  - 3. For apparel/garment**
- **New definition**

Term	Definition
Recycled down and feathers	Down and feathers which have been reprocessed(washed and refined) from reclaimed(used) down and feathers
Used down and feathers	Down and feathers taken out from used down and feather finished products or finished products that have been washed

## 2)-2 The quality standard for “Recycled Down” by JDFA

### ▪ New quality standards (Down quilts/comforter)

The quality standard applies to products that contain 100% Recycled down and feathers.

Label Classification	Down Power	Turbidity	Oxygen Number	Fiber	Residual matter
A	400dp	1,000mm	$\leq 4.8\text{mg}$	$\leq 8.0\%$	$\leq 1.0\%$
B	350dp	1,000mm	$\leq 4.8\text{mg}$	$\leq 8.0\%$	$\leq 1.5\%$
C	300dp	1,000mm	$\leq 4.8\text{mg}$	$\leq 8.0\%$	$\leq 1.5\%$
D	250dp	1,000mm	$\leq 4.8\text{mg}$	$\leq 10.0\%$	$\leq 1.5\%$

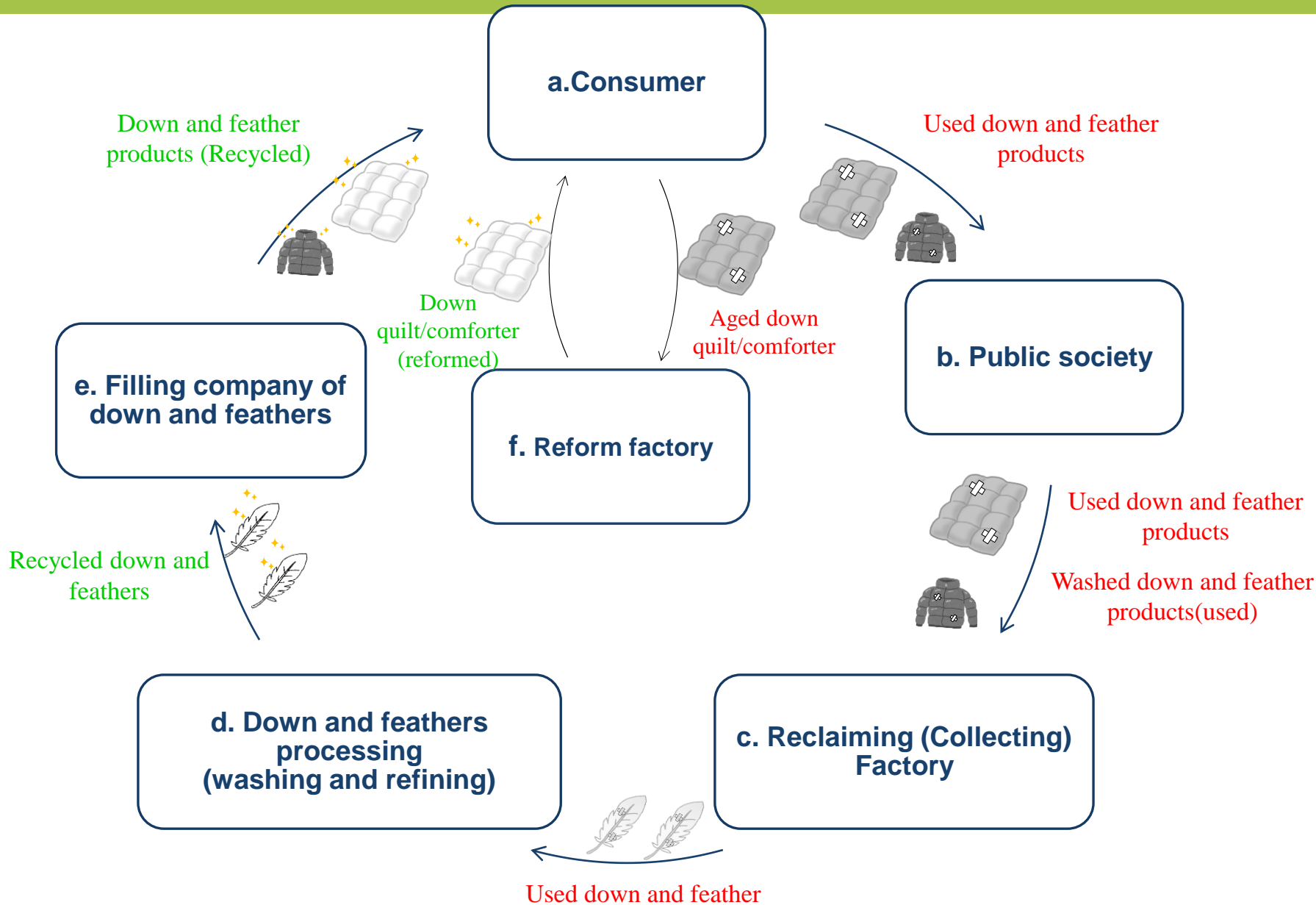
### ▪ Traceability

- ① receiving records ② washing records ③ sorting records,  
④ filling records ⑤ inventory ⑥ disposal control

✳ JDFA promotes record keeping for traceability of recycled down materials. Members are obligated to submit these records to JDFA upon request. (Regulation V II 2.)



# 2)-3 Recycle-based Society in Japan



# Quality for Global Environmental Protection



SDGs

Recycle-  
based  
Society

Life Cycle  
Assessments  
(LCA)