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UNIQLO : ULTRA-NECESSITY IN THIS ERA

by ET



FIG.1


'Employment opportunities': investment brings significant win for Coast retail sector
FIG.2

If you have read the latest headlines, or look at brands in your nearby shopping centres, you may find this red logo is everywhere. I have recently travelled to Sydney and it is easy to spot this logo within any Westfield shopping centres. The expansion outside of Japan is pretty amazing and extensive. There are clearly more shopfronts treading globally.

In numbers, Uniqlo's parent company is currently trending the no.2 spot slightly behind Zara's Inditex and much better than H&M[1]. It is a milestone to be just one step away from Zara. Have you look at what you have purchased lately? For summer, their t-shirts, singlets is my must have. For winter, I happen to step into Sydney with minimal luggage and Uniqlo was my first thought to get a jacket and some warm socks. It is a lifesaver with its location conveniently located very nearby. From Nikkei Asia, Uniqlo 2026 revenue forecast is at USD24.1bn[2], this number would probably over the other two brands.

[1] It is in our minds to constantly shop for the next best thing, next hype products, fear of missing out (FOMO). Have you ever thought about where are we actually aiming for in life? Fashionably? Spiritually? Progressively? I had this question as to where are we all heading hoarding all these stuff? In a looped-in cycle to buy and buy again - what exactly are we looking for in reality?

[2] As above

With my physical presence in both Sydney and Hong Kong, I realise Zara and H&M had been streamlining its shops especially in the buzz CBD areas. Therefore, it is less accessible to try on and see the latest range despite it is easily accessible online. I had not made any purchases in both brands for a significant long time while I would think of Uniqlo first whenever there is anything I want to buy. COS, would be something of quality I bought, own by H&M.Clearly the two brands are streamlining Asian presence with less and less physical shops[3]. As for Uniqlo, it is on a expansion phase globally, Australia, Europe and North America.



FIG.3

So besides how Uniqlo offer the best affordable items in all weather and in all price range, my interest in the brand may go way back when I read the first biography about the brand. Its founder Tadashi Yanai ("Yanai"), had a long term business vision, unconventional strategies and his meticulous plan to execute its really something for everyone to learn. In the early stages of building Uniqlo, Yanai always uphold the "SPA", Special retailer of Private label Appeal meaning to always selling good clothing to all kinds of people.The brand integrate design, production, logistic and distribution all in one company. It was never a story to sell cheap clothing, but affordability with quality – and this practically distinguishes from all other brands. They see customer as king and never discriminate across age or race. It is quite extraordinary when you see how the other brands material get thinner and thinner but not Uniqlo. Uniqlo is an extent of any marketing strategy, from Peter Drucker's customer creation", "value creation", it is an ongoing real life marketing case that is interesting to understand. It is extraordinary for Uniqlo to create long queue when they are selling their great invention. It was noted that at their first shop in Hiroshima, with the long queues, Yanai would ask staff to offer milk and bread to customers – such warm gesture are really hard to find anywhere else. Yanai is now the second- richest person in Japan.

Many of you may be too young to recall, their first breakthrough products was the double sided fleece jacket in 1998 with many colours to choose from. This is a fleece boom of 36mn jackets in 3 years of sales[4]. I only recall in hindsight of my mom purchased this ultra warm double sided fleece with her friends, I did recall is super warm and well worth the money. Check your parent's closet, maybe there is one in there.

FT latest headlines Uniqlo's plan to dominate global started from a very simple idea to provide the best clothing to people[5]. Its long term goals and strategy comfortably fits into our need for affordable clothing, especially after so many economic crises not only Covid, Wars and more to come.It's uniqueness does not only sells in local or Asean regions but also in the Europe and North America. Despite the company's struggle through the succession story as every success stories would, it moved on that growth pains gracefully. When you think such company that sells basic clothing items would be hard to evolve, it managed to continue to excel with its partnership with industry elites such as Clare Waight Keller as creative director, with Christophe Lemaire, with Roger Federer and with fabric expert Toray.

Even though, the partnership with Lemaire is ending, you can see Uniqlo's farfetched insight to incubate talents with exit points to let design talent establish their own shop once there are ready. Uniqlo did invested into Lemaire's company and with collaboration, the designed goods are a great sell. The cross collaboration of Uniqlo with Lemaire and with Roger Federer's representation, you can see a deep plan to break into European market. This is not a one day plan. Along with how the economy is behaving especially after Covid, ESG, war and other unexpected events – affordable clothing is a need especially in Europe.

Japan culture to continue to develop new initiatives to make everyday lives easier, its partnership with Toray to formulate better materials in extreme weather is just a game changer. These products include AIRism, Ultra-Light Down. I personally love their affordable cashmeres.

This is my letter of gratitude to Uniqlo in continuing to offer great wears for everyone of us despite how the world is changing. I will continue to purchase AIRism and cashmere range as a fan. With the new collaboration, I would certainly keep a lookout although with the hype I am not sure I could be the first in line. Let's see.

[3] From political standpoint, it may be feasible.
[4] https://www.ft.com/content/3d9fcefd-f07f-47e2-a92e-32ee41c0443d?syn-25a6b1a6=1
[5] As above

Fig. 1 Sourced from Uniqlo homepage
Fig. 2 News https://www.sunshinecoastnews.com.au/2026/06/23/global-retailer-expands-to-coast-with-new-store/
Fig. 3 FT headlines referenced from point 4

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