

Consumer Appliances in Japan

January 2023

Table of Contents

EXECUTIVE SUMMARY

Consumer appliances in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for consumer appliances?

MARKET INDICATORS

Table 1 - Household Penetration of Selected Total Stock Consumer Appliances by Category 2017-2022

Table 2 - Replacement Cycles of Consumer Appliances by Category 2017-2022

Table 3 - Forecast Household Penetration of Selected Total Stock Consumer Appliances by Category 2022-2027

Table 4 - Forecast Replacement Cycles of Consumer Appliances by Category 2022-2027

MARKET DATA

Table 5 - Sales of Consumer Appliances by Category: Volume 2017-2022

Table 6 - Sales of Consumer Appliances by Category: Value 2017-2022

Table 7 - Sales of Consumer Appliances by Category: % Volume Growth 2017-2022

Table 8 - Sales of Consumer Appliances by Category: % Value Growth 2017-2022

Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2017-2022

Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2017-2022

Table 11 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2017-2022

Table 12 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2017-2022

Table 13 - Sales of Small Appliances by Category: Volume 2017-2022

Table 14 - Sales of Small Appliances by Category: Value 2017-2022

Table 15 - Sales of Small Appliances by Category: % Volume Growth 2017-2022

Table 16 - Sales of Small Appliances by Category: % Value Growth 2017-2022

Table 17 - NBO Company Shares of Major Appliances: % Volume 2018-2022

Table 18 - LBN Brand Shares of Major Appliances: % Volume 2019-2022

Table 19 - NBO Company Shares of Small Appliances: % Volume 2018-2022

Table 20 - LBN Brand Shares of Small Appliances: % Volume 2019-2022

Table 21 - Distribution of Major Appliances by Format: % Volume 2017-2022

Table 22 - Distribution of Small Appliances by Format: % Volume 2017-2022

Table 23 - Forecast Sales of Consumer Appliances by Category: Volume 2022-2027

Table 24 - Forecast Sales of Consumer Appliances by Category: Value 2022-2027

Table 25 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2022-2027

Table 26 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2022-2027

Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2022-2027

Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2022-2027

Table 29 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2022-2027

Table 30 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2022-2027

Table 31 - Forecast Sales of Small Appliances by Category: Volume 2022-2027

Table 32 - Forecast Sales of Small Appliances by Category: Value 2022-2027

Table 33 - Forecast Sales of Small Appliances by Category: % Volume Growth 2022-2027

Table 34 - Forecast Sales of Small Appliances by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2022 DEVELOPMENTS

A dishwasher is increasingly a “must-have” for busy households
Panasonic dominates dishwashers

PROSPECTS AND OPPORTUNITIES

Supporting sustainability
Tackling the issue of “possessed but unused”

CATEGORY DATA

Table 35 - Sales of Dishwashers by Category: Volume 2017-2022
Table 36 - Sales of Dishwashers by Category: Value 2017-2022
Table 37 - Sales of Dishwashers by Category: % Volume Growth 2017-2022
Table 38 - Sales of Dishwashers by Category: % Value Growth 2017-2022
Table 39 - Sales of Dishwashers by Format: % Volume 2017-2022
Table 40 - Sales of Dishwashers by Connected Appliances: % Volume 2018-2022
Table 41 - NBO Company Shares of Dishwashers: % Volume 2018-2022
Table 42 - LBN Brand Shares of Dishwashers: % Volume 2019-2022
Table 43 - Distribution of Dishwashers by Format: % Volume 2017-2022
Table 44 - Production of Dishwashers: Total Volume 2017-2022
Table 45 - Forecast Sales of Dishwashers by Category: Volume 2022-2027
Table 46 - Forecast Sales of Dishwashers by Category: Value 2022-2027
Table 47 - Forecast Sales of Dishwashers by Category: % Volume Growth 2022-2027
Table 48 - Forecast Sales of Dishwashers by Category: % Value Growth 2022-2027

Home Laundry Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

A growing number of time-saving features emerge
Gas-powered automatic dryers are increasingly popular amongst home owners
Chinese players grow in the low-price segment, but will aim for a larger market

PROSPECTS AND OPPORTUNITIES

Time-saving and higher quality result will be valued by consumers
Collaborations with detergent players at an early stage

CATEGORY DATA

Table 49 - Sales of Home Laundry Appliances by Category: Volume 2017-2022
Table 50 - Sales of Home Laundry Appliances by Category: Value 2017-2022
Table 51 - Sales of Home Laundry Appliances by Category: % Volume Growth 2017-2022
Table 52 - Sales of Home Laundry Appliances by Category: % Value Growth 2017-2022
Table 53 - Sales of Automatic Washer Dryers by Connected Appliances: % Volume 2017-2022
Table 54 - Sales of Automatic Washing Machines by Format: % Volume 2017-2022
Table 55 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2017-2022
Table 56 - Sales of Automatic Washing Machines by Connected Appliances: % Volume 2018-2022
Table 57 - NBO Company Shares of Home Laundry Appliances: % Volume 2018-2022
Table 58 - LBN Brand Shares of Home Laundry Appliances: % Volume 2019-2022
Table 59 - Distribution of Home Laundry Appliances by Format: % Volume 2017-2022
Table 60 - Production of Home Laundry Appliances: Total Volume 2017-2022
Table 61 - Forecast Sales of Home Laundry Appliances by Category: Volume 2022-2027
Table 62 - Forecast Sales of Home Laundry Appliances by Category: Value 2022-2027

Table 63 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2022-2027

Table 64 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2022-2027

Large Cooking Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery of new housing starts

Rinnai rules built-in hobs and ovens in Japan

Inflation hits large cooking appliances

PROSPECTS AND OPPORTUNITIES

Decline to be driven by fall in new housing starts

Cooker hoods as part of holistic indoor air quality management

Hobs set to diversify

CATEGORY DATA

Table 65 - Sales of Large Cooking Appliances by Category: Volume 2017-2022

Table 66 - Sales of Large Cooking Appliances by Category: Value 2017-2022

Table 67 - Sales of Large Cooking Appliances by Category: % Volume Growth 2017-2022

Table 68 - Sales of Large Cooking Appliances by Category: % Value Growth 2017-2022

Table 69 - Sales of Built-in Hobs by Format: % Volume 2017-2022

Table 70 - Sales of Ovens by Connected Appliances: % Volume 2018-2022

Table 71 - NBO Company Shares of Large Cooking Appliances: % Volume 2018-2022

Table 72 - LBN Brand Shares of Large Cooking Appliances: % Volume 2019-2022

Table 73 - NBO Company Shares of Built-in Hobs: % Volume 2018-2022

Table 74 - NBO Company Shares of Ovens: % Volume 2018-2022

Table 75 - NBO Company Shares of Cooker Hoods: % Volume 2018-2022

Table 76 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2018-2022

Table 77 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2018-2022

Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2017-2022

Table 79 - Production of Large Cooking Appliances: Total Volume 2017-2022

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2022-2027

Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2022-2027

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2022-2027

Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2022-2027

Microwaves in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

From multifunctional to simple and personalised microwaves

Zojirushi enters microwaves

Lack of products available to sell in 2022

PROSPECTS AND OPPORTUNITIES

Microwaves likely to be increasingly software-defined rather than hardware-defined

Smart appliances could step into the area of wellness

CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2017-2022

Table 85 - Sales of Microwaves by Category: Value 2017-2022

Table 86 - Sales of Microwaves by Category: % Volume Growth 2017-2022

- Table 87 - Sales of Microwaves by Category: % Value Growth 2017-2022
- Table 88 - Sales of Microwaves by Connected Appliances: % Volume 2018-2022
- Table 89 - NBO Company Shares of Microwaves: % Volume 2018-2022
- Table 90 - LBN Brand Shares of Microwaves: % Volume 2019-2022
- Table 91 - Distribution of Microwaves by Format: % Volume 2017-2022
- Table 92 - Production of Microwaves: Total Volume 2017-2022
- Table 93 - Forecast Sales of Microwaves by Category: Volume 2022-2027
- Table 94 - Forecast Sales of Microwaves by Category: Value 2022-2027
- Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2022-2027
- Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2022-2027

Refrigeration Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

The weakening impact of the pandemic reduces volume sales
 Despite seeing decline, freezers maintains higher sales than pre-pandemic
 Fridge-freezers incorporating cameras appear in the market

PROSPECTS AND OPPORTUNITIES

Connectivity and smart features blossom
 Refrigeration appliances to play a crucial role in reducing food waste in homes
 Haier Group set to maintain growth in its share

CATEGORY DATA

- Table 97 - Sales of Refrigeration Appliances by Category: Volume 2017-2022
- Table 98 - Sales of Refrigeration Appliances by Category: Value 2017-2022
- Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2017-2022
- Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2017-2022
- Table 101 - Sales of Freezers by Format: % Volume 2017-2022
- Table 102 - Sales of Freezers by Volume Capacity: % Volume 2017-2022
- Table 103 - Sales of Fridge Freezers by Format: % Volume 2017-2022
- Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2017-2022
- Table 105 - Sales of Fridge Freezers by Connected Appliances: % Volume 2018-2022
- Table 106 - Sales of Fridges by Volume Capacity: % Volume 2017-2022
- Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2018-2022
- Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2019-2022
- Table 109 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2018-2022
- Table 110 - NBO Company Shares of Freestanding Fridges: % Volume 2018-2022
- Table 111 - Distribution of Refrigeration Appliances by Format: % Volume 2017-2022
- Table 112 - Production of Refrigeration Appliances: Total Volume 2017-2022
- Table 113 - Forecast Sales of Refrigeration Appliances by Category: Volume 2022-2027
- Table 114 - Forecast Sales of Refrigeration Appliances by Category: Value 2022-2027
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2022-2027
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2022-2027

Air Treatment Products in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Air treatment products is one of the categories most impacted by COVID-19
 Ventilation function becomes standard for high-end split air conditioners

PROSPECTS AND OPPORTUNITIES

New ways to improve hygiene

Holistic air treatment likely to be investigated

CATEGORY DATA

Table 117 - Sales of Air Treatment Products by Category: Volume 2017-2022

Table 118 - Sales of Air Treatment Products by Category: Value 2017-2022

Table 119 - Sales of Air Treatment Products by Category: % Volume Growth 2017-2022

Table 120 - Sales of Air Treatment Products by Category: % Value Growth 2017-2022

Table 121 - Sales of Air Conditioners by Connected Appliances: % Volume 2018-2022

Table 122 - NBO Company Shares of Air Treatment Products: % Volume 2018-2022

Table 123 - LBN Brand Shares of Air Treatment Products: % Volume 2019-2022

Table 124 - Distribution of Air Treatment Products by Format: % Volume 2017-2022

Table 125 - Production of Air Conditioners: Total Volume 2017-2022

Table 126 - Forecast Sales of Air Treatment Products by Category: Volume 2022-2027

Table 127 - Forecast Sales of Air Treatment Products by Category: Value 2022-2027

Table 128 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2022-2027

Table 129 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2022-2027

Food Preparation Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Food preparation appliances is a category in decline

Juice extractors continues to fall despite the wellness trend

Hurom continues to release slow juicers, but limits distribution

PROSPECTS AND OPPORTUNITIES

New ways of selling

CATEGORY DATA

Table 130 - Sales of Food Preparation Appliances by Category: Volume 2017-2022

Table 131 - Sales of Food Preparation Appliances by Category: Value 2017-2022

Table 132 - Sales of Food Preparation Appliances by Category: % Volume Growth 2017-2022

Table 133 - Sales of Food Preparation Appliances by Category: % Value Growth 2017-2022

Table 134 - NBO Company Shares of Food Preparation Appliances: % Volume 2018-2022

Table 135 - LBN Brand Shares of Food Preparation Appliances: % Volume 2019-2022

Table 136 - Distribution of Food Preparation Appliances by Format: % Volume 2017-2022

Table 137 - Forecast Sales of Food Preparation Appliances by Category: Volume 2022-2027

Table 138 - Forecast Sales of Food Preparation Appliances by Category: Value 2022-2027

Table 139 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2022-2027

Table 140 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2022-2027

Personal Care Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Pandemic-led volume decline slows in 2022

Premiumisation and inflation push up the unit prices of hair dryers

Men's beauty is becoming more important

PROSPECTS AND OPPORTUNITIES

Sharp's new product cares for children's hair
Fragmentation, personalisation, premiumisation

CATEGORY DATA

Table 141 - Sales of Personal Care Appliances by Category: Volume 2017-2022
Table 142 - Sales of Personal Care Appliances by Category: Value 2017-2022
Table 143 - Sales of Personal Care Appliances by Category: % Volume Growth 2017-2022
Table 144 - Sales of Personal Care Appliances by Category: % Value Growth 2017-2022
Table 145 - Sales of Body Shavers by Format: % Volume 2017-2022
Table 146 - Sales of Hair Care Appliances by Format: % Volume 2017-2022
Table 147 - NBO Company Shares of Personal Care Appliances 2018-2022
Table 148 - LBN Brand Shares of Personal Care Appliances 2019-2022
Table 149 - Distribution of Personal Care Appliances by Format: % Volume 2017-2022
Table 150 - Forecast Sales of Personal Care Appliances by Category: Volume 2022-2027
Table 151 - Forecast Sales of Personal Care Appliances by Category: Value 2022-2027
Table 152 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2022-2027
Table 153 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2022-2027

Small Cooking Appliances in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Categories that enrich the time spent at home turn to decline
Growth of rice cookers dependent on multi-cookers

PROSPECTS AND OPPORTUNITIES

Bruno shows the opportunities available for smaller brands
Will consumers return to light fryers?

CATEGORY DATA

Table 154 - Sales of Small Cooking Appliances by Category: Volume 2017-2022
Table 155 - Sales of Small Cooking Appliances by Category: Value 2017-2022
Table 156 - Sales of Small Cooking Appliances by Category: % Volume Growth 2017-2022
Table 157 - Sales of Small Cooking Appliances by Category: % Value Growth 2017-2022
Table 158 - Sales of Freestanding Hobs by Format: % Volume 2017-2022
Table 159 - NBO Company Shares of Small Cooking Appliances: % Volume 2018-2022
Table 160 - LBN Brand Shares of Small Cooking Appliances: % Volume 2019-2022
Table 161 - Distribution of Small Cooking Appliances by Format: % Volume 2017-2022
Table 162 - Forecast Sales of Small Cooking Appliances by Category: Volume 2022-2027
Table 163 - Forecast Sales of Small Cooking Appliances by Category: Value 2022-2027
Table 164 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2022-2027
Table 165 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2022-2027

Vacuum Cleaners in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Stick vacuum cleaners become the standard in vacuum cleaners
Robotic vacuum cleaners struggles to grow

PROSPECTS AND OPPORTUNITIES

Amazon is in the process of acquiring iRobot

An end to the competition for lighter and stronger models

CATEGORY DATA

- Table 166 - Sales of Vacuum Cleaners by Category: Volume 2017-2022
- Table 167 - Sales of Vacuum Cleaners by Category: Value 2017-2022
- Table 168 - Sales of Vacuum Cleaners by Category: % Volume Growth 2017-2022
- Table 169 - Sales of Vacuum Cleaners by Category: % Value Growth 2017-2022
- Table 170 - Sales of Robotic Vacuum Cleaners by Connected Appliances: % Volume 2018-2022
- Table 171 - NBO Company Shares of Vacuum Cleaners: % Volume 2018-2022
- Table 172 - LBN Brand Shares of Vacuum Cleaners: % Volume 2019-2022
- Table 173 - Distribution of Vacuum Cleaners by Format: % Volume 2017-2022
- Table 174 - Forecast Sales of Vacuum Cleaners by Category: Volume 2022-2027
- Table 175 - Forecast Sales of Vacuum Cleaners by Category: Value 2022-2027
- Table 176 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2022-2027
- Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-appliances-in-japan/report.