

Consumer Appliances in Japan

December 2023

Table of Contents

Consumer Appliances in Japan

EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture

2023 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 2018-2024

Table 2 - Replacement Cycles of Consumer Appliances by Category 2018-2024

MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2018-2023

Table 4 - Sales of Consumer Appliances by Category: Value 2018-2023

Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2018-2023

Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2018-2023

Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023

Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023

Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023

Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023

Table 11 - Sales of Small Appliances by Category: Volume 2018-2023

Table 12 - Sales of Small Appliances by Category: Value 2018-2023

Table 13 - Sales of Small Appliances by Category: % Volume Growth 2018-2023

Table 14 - Sales of Small Appliances by Category: % Value Growth 2018-2023

Table 15 - NBO Company Shares of Major Appliances: % Volume 2019-2023

Table 16 - LBN Brand Shares of Major Appliances: % Volume 2020-2023

Table 17 - NBO Company Shares of Small Appliances: % Volume 2019-2023

Table 18 - LBN Brand Shares of Small Appliances: % Volume 2020-2023

Table 19 - Distribution of Major Appliances by Format: % Volume 2018-2023

Table 20 - Distribution of Small Appliances by Format: % Volume 2018-2023

Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2023-2028

Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2023-2028

Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028

Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028

Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028

Table 29 - Forecast Sales of Small Appliances by Category: Volume 2023-2028

Table 30 - Forecast Sales of Small Appliances by Category: Value 2023-2028

Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Dishwashers in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dishwashers is one of the most demanded appliances for time-saving
Lower new housing starts leads to decline for built-in dishwashers
Panasonic maintains its dominance

PROSPECTS AND OPPORTUNITIES

Whether connectivity is necessary for dishwashers is questionable
Convincing consumers of the sustainability of dishwashers
Increasing the usage rate as well as the possession rate

CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023
Table 34 - Sales of Dishwashers by Category: Value 2018-2023
Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023
Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023
Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023
Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2019-2023
Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023
Table 40 - LBN Brand Shares of Dishwashers: % Volume 2020-2023
Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023
Table 42 - Production of Dishwashers: Total Volume 2018-2023
Table 43 - Forecast Sales of Dishwashers by Category: Volume 2023-2028
Table 44 - Forecast Sales of Dishwashers by Category: Value 2023-2028
Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028
Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

[Home Laundry Appliances in Japan](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Drum format grows, claiming the benefit of saving time and mitigating stress
Some consumers still value the price and washing power of the vertical format
Rinnai's Kanta-kun grows its share in automatic dryers

PROSPECTS AND OPPORTUNITIES

Panasonic and Hitachi lead, while Chinese players gradually increase their presence
Adjacent products and new laundry habits

CATEGORY DATA

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2018-2023
Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023
Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023
Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023
Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023
Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2018-2023
Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023
Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023
Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023
Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023
Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023
Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023
Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028

Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028

Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028

Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

Large Cooking Appliances in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

The drop in new housing starts hits volume sales of large cooking appliances

Price increases support growth in value terms

Fujioh and Rinnai lead large cooking appliances

PROSPECTS AND OPPORTUNITIES

Will large cooking appliances benefit from the home as a sanctuary trend?

The potential of cooker hoods as part of a home air conditioning system

CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2018-2023

Table 64 - Sales of Large Cooking Appliances by Category: Value 2018-2023

Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023

Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023

Table 67 - Sales of Built-in Hobs by Format: % Volume 2018-2023

Table 68 - Sales of Ovens by Smart Appliances: % Volume 2019-2023

Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023

Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023

Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2019-2023

Table 72 - NBO Company Shares of Ovens: % Volume 2019-2023

Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2019-2023

Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2019-2023

Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023

Table 76 - NBO Company Shares of Cookers: % Volume 2019-2023

Table 77 - NBO Company Shares of Range Cookers: % Volume 2019-2023

Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2018-2023

Table 79 - Production of Large Cooking Appliances: Total Volume 2018-2023

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028

Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028

Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

Microwaves in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Two years of decline, after two years of growth during home seclusion

Four companies compete at the top

A basic multifunctional kitchen appliance

PROSPECTS AND OPPORTUNITIES

Players will have difficulty differentiating

Zojirushi enters microwaves in collaboration with Galanz

Will smart functions change cooking?

CATEGORY DATA

Table 84 - Sales of Microwaves by Category: Volume 2018-2023
Table 85 - Sales of Microwaves by Category: Value 2018-2023
Table 86 - Sales of Microwaves by Category: % Volume Growth 2018-2023
Table 87 - Sales of Microwaves by Category: % Value Growth 2018-2023
Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2019-2023
Table 89 - NBO Company Shares of Microwaves: % Volume 2019-2023
Table 90 - LBN Brand Shares of Microwaves: % Volume 2020-2023
Table 91 - Distribution of Microwaves by Format: % Volume 2018-2023
Table 92 - Production of Microwaves: Total Volume 2018-2023
Table 93 - Forecast Sales of Microwaves by Category: Volume 2023-2028
Table 94 - Forecast Sales of Microwaves by Category: Value 2023-2028
Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028
Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

Refrigeration Appliances in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales of refrigeration appliances decline in 2023
Freezers bucks the declining trend
No clear champion, with seven players with double-digit shares in fridge-freezers

PROSPECTS AND OPPORTUNITIES

From a series of enhancements to non-linear improvements
Aqua and Haier set to grow thanks to innovation
Sustainability will increasingly be considered

CATEGORY DATA

Table 97 - Sales of Refrigeration Appliances by Category: Volume 2018-2023
Table 98 - Sales of Refrigeration Appliances by Category: Value 2018-2023
Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023
Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023
Table 101 - Sales of Freezers by Format: % Volume 2018-2023
Table 102 - Sales of Freezers by Volume Capacity: % Volume 2018-2023
Table 103 - Sales of Fridge Freezers by Format: % Volume 2018-2023
Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023
Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023
Table 106 - Sales of Fridges by Volume Capacity: % Volume 2018-2023
Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023
Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023
Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023
Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023
Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2019-2023
Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
Table 114 - Production of Refrigeration Appliances: Total Volume 2018-2023
Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rebound from good performances in 2020 continues for air purifiers and humidifiers
Daikin maintains its lead in split air conditioners

PROSPECTS AND OPPORTUNITIES

Energy-saving standard to change by 2027-2028
Premiumise with functionality, or simplify?

CATEGORY DATA

Table 119 - Sales of Air Treatment Products by Category: Volume 2018-2023
Table 120 - Sales of Air Treatment Products by Category: Value 2018-2023
Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023
Table 123 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023
Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023
Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
Table 126 - Distribution of Air Treatment Products by Format: % Volume 2018-2023
Table 127 - Production of Air Conditioners: Total Volume 2018-2023
Table 128 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028
Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

Food Preparation Appliances in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Blenders and food processors see much slower declines than other categories
Panasonic leads juice extractors

PROSPECTS AND OPPORTUNITIES

The home as a sanctuary trend will not necessarily help food preparation appliances
Subscription-based trials

CATEGORY DATA

Table 132 - Sales of Food Preparation Appliances by Category: Volume 2018-2023
Table 133 - Sales of Food Preparation Appliances by Category: Value 2018-2023
Table 134 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023
Table 135 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023
Table 136 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023
Table 137 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023
Table 138 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028
Table 140 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028
Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028
Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

Personal Care Appliances in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Flat volume sales, accompanied by a large increase in value sales

Hair care appliances maintains its positive momentum

Yaman grows its presence with high technology

PROSPECTS AND OPPORTUNITIES

Innovation in body shavers

Return of sales to inbound tourists will rely on continued innovation

CATEGORY DATA

Table 143 - Sales of Personal Care Appliances by Category: Volume 2018-2023

Table 144 - Sales of Personal Care Appliances by Category: Value 2018-2023

Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023

Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023

Table 147 - Sales of Body Shavers by Format: % Volume 2018-2023

Table 148 - Sales of Hair Care Appliances by Format: % Volume 2018-2023

Table 149 - NBO Company Shares of Personal Care Appliances 2019-2023

Table 150 - LBN Brand Shares of Personal Care Appliances 2020-2023

Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023

Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028

Table 153 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028

Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume down, value up

Diversification in coffee machines

The slowdown of multi-cookers

PROSPECTS AND OPPORTUNITIES

Balmuda joins electric grills

Share movements according to category performances

CATEGORY DATA

Table 156 - Sales of Small Cooking Appliances by Category: Volume 2018-2023

Table 157 - Sales of Small Cooking Appliances by Category: Value 2018-2023

Table 158 - Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023

Table 159 - Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023

Table 160 - Sales of Freestanding Hobs by Format: % Volume 2018-2023

Table 161 - NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023

Table 162 - LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023

Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

Table 165 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028

Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

Vacuum Cleaners in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stick vacuum cleaners reaches double the volume sales of cylinder vacuum cleaners
Robotic vacuum cleaners finally holds a double-digit volume share
Hitachi overtakes Panasonic to become the leading brand

PROSPECTS AND OPPORTUNITIES

Wet and dry vacuum cleaners sneaks into the category
Vacuum cleaners go green

CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2018-2023
Table 169 - Sales of Vacuum Cleaners by Category: Value 2018-2023
Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023
Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023
Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023
Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023
Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023
Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023
Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028
Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028
Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028
Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2023-2028

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.