

Home and Garden in Japan

May 2023

Table of Contents

Home and Garden in Japan

EXECUTIVE SUMMARY

Home and garden in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for home and garden?

MARKET DATA

Table 1 - Sales of Home and Garden by Category: Value 2017-2022

Table 2 - Sales of Home and Garden by Category: % Value Growth 2017-2022

Table 3 - NBO Company Shares of Home and Garden: % Value 2018-2022

Table 4 - LBN Brand Shares of Home and Garden: % Value 2019-2022

Table 5 - Penetration of Private Label in Home and Garden by Category: % Value 2017-2022

Table 6 - Distribution of Home and Garden by Format: % Value 2017-2022

Table 7 - Distribution of Home and Garden by Format and Category: % Value 2022

Table 8 - Forecast Sales of Home and Garden by Category: Value 2022-2027

Table 9 - Forecast Sales of Home and Garden by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Home Improvement in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Home improvement sales remain higher than pre-pandemic with the rise in DIY projects

Demand for power tools higher than in the pre-pandemic period

PROSPECTS AND OPPORTUNITIES

Bathroom and sanitaryware likely to grow over the forecast period

Move towards rental may hamper growth in home improvement

Retail e-commerce likely to become a more prominent distribution channel

CATEGORY DATA

Table 10 - Sales of Home Improvement by Category: Value 2017-2022

Table 11 - Sales of Home Improvement by Category: % Value Growth 2017-2022

Table 12 - NBO Company Shares of Home Improvement: % Value 2018-2022

Table 13 - LBN Brand Shares of Home Improvement: % Value 2019-2022

Table 14 - Distribution of Home Improvement by Format: % Value 2017-2022

Table 15 - Forecast Sales of Home Improvement by Category: Value 2022-2027

Table 16 - Forecast Sales of Home Improvement by Category: % Value Growth 2022-2027

Gardening in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Gardening declines in 2022, but increases during the pandemic overall

Lawn mowers see an increase in demand

Kärcher gains traction due to new product development

PROSPECTS AND OPPORTUNITIES

The future is not very bright for gardening in Japan
Efficiency in preserving plant quality set to aid growth of herbicides
Sustainability expected to gain traction over the forecast period

CATEGORY DATA

Table 17 - Sales of Gardening by Category: Value 2017-2022
Table 18 - Sales of Gardening by Category: % Value Growth 2017-2022
Table 19 - NBO Company Shares of Gardening: % Value 2018-2022
Table 20 - LBN Brand Shares of Gardening: % Value 2019-2022
Table 21 - Distribution of Gardening by Format: % Value 2017-2022
Table 22 - Forecast Sales of Gardening by Category: Value 2022-2027
Table 23 - Forecast Sales of Gardening by Category: % Value Growth 2022-2027

Homewares in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Homewares sales increase in Japan over 2019-2022 due to “nesting” phenomenon
Demand for sustainable products drives growth
Traditionalism is a major trend in homewares

PROSPECTS AND OPPORTUNITIES

Sales of multifunctional homewares likely to increase
Home cooking trend expected to support growth in the category
Both online and offline retailers anticipated to gain consumer footfall

CATEGORY DATA

Table 24 - Sales of Homewares by Category: Value 2017-2022
Table 25 - Sales of Homewares by Category: % Value Growth 2017-2022
Table 26 - Sales of Homewares by Material: % Value 2017-2022
Table 27 - NBO Company Shares of Homewares: % Value 2018-2022
Table 28 - LBN Brand Shares of Homewares: % Value 2019-2022
Table 29 - Distribution of Homewares by Format: % Value 2017-2022
Table 30 - Forecast Sales of Homewares by Category: Value 2022-2027
Table 31 - Forecast Sales of Homewares by Category: % Value Growth 2022-2027

Home Furnishings in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Home furnishings reaches maturity in Japan
Rugs valued by Japanese consumers for their adaptability as pieces of home décor
Private label lines help Nitori lead home furnishings

PROSPECTS AND OPPORTUNITIES

Minimalistic furniture expected to grow over the forecast period
Ageing population and foreign competition may impact the category
Consumers likely to focus on customisable furniture

CATEGORY DATA

Table 32 - Sales of Home Furnishings by Category: Value 2017-2022

Table 33 - Sales of Home Furnishings by Category: % Value Growth 2017-2022

Table 34 - NBO Company Shares of Home Furnishings: % Value 2018-2022

Table 35 - LBN Brand Shares of Home Furnishings: % Value 2019-2022

Table 36 - LBN Brand Shares of Light Sources: % Value 2019-2022

Table 37 - Distribution of Home Furnishings by Format: % Value 2017-2022

Table 38 - Forecast Sales of Home Furnishings by Category: Value 2022-2027

Table 39 - Forecast Sales of Home Furnishings 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/home-and-garden-in-japan/report.