

The Japanese Pump Market

Products in pump dispensers increase 3% in 2016



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Japanese Aerosol Industry Newspaper Co., Ltd. recently reported that approximately 623 million pump dispensers, including trigger sprayers, were marketed in Japan last year, which shows an estimated 3% increase over 2015. The figure is the second largest since 2010, when Japan experienced a large number of influenza cases.

It seems that the Japanese pump market still has room for further growth in the future, compared with that of the aerosol products market.

Although the 2016 Japanese aerosol market grew slightly from the previous year, the market is sluggish. In comparison, the pump market has benefited from a tailwind of demand from foreign visitors. Like other developed countries, Japan has seen a huge amount of foreign visitors and their demand for “Made in Japan” products, especially cosmetics and pharmaceuticals (certainly electronics), has been contributing to the Japanese economy. Unfortunately, the demand is not for aerosol products because of the rules and restrictions pertaining to airline travel.

In addition, demand has grown rapidly for export products such as “Made-in-Japan” shampoos, conditioners, skincare and cosmetics to other Asian countries. As a result, a general increase of orders makes for a tight balance of supply and demand and there is concern about delivery delays, especially by large pump marketers such as Yoshino Kogyosho and Mitani Valve.

Pump manufacturer news

In 2016, Nemera Pumps (formerly Rexam Pharma Pumps) announced a partnership Higuchi Inc., manufacturer of pharmaceuticals and chemicals. Aptar Pharmaceutical Co. closed its Japanese branch office and Taisei Kako Co. was contracted to import Aptar pumps. Presco, a small but well-established airless pump manufacturer, went bankrupt and its business was acquired by Nihon Kolmar Co., Ltd, a leading cosmetics original equipment manufacturer (OEM).

Pump sales

In 2016, about 203 million 1–3cc dispenser pumps were sold. Sales of other kinds of

pumps were as follows: about 130 million trigger-pumps; about 110 million finger-pumps; 87 million one-drop lotion pumps; 12 million high viscosity dispenser (HVD)/airless pumps; 50 million foam pumps and 32 million “other” types of pumps were marketed.

Three-cc dispenser pumps were mainly used for hygiene products, such as shampoos, hair conditioners and body soaps. In the market, silicone-free shampoos or so-called “non-silicone-shampoos” continue to sell well since health care wholesaler Japan Gateway launched the very popular product. Following that launch, consumers and marketers were very keen on words such as “organic,” “natural ingredients only” or “eco-friendly.” Chinese import/export demand has also contributed a great deal to the popularity of 3cc dispenser pumps.

Furthermore, 1cc dispenser pumps, used mainly for face-cleansing products, have maintained steady sales.

Sales for 1–3cc dispenser pumps saw an approximate 2% increase from the previous year. The market was led by Yoshino Kogyosyo (holding 59% of market share) followed by Mitani Valve (30%). They both have multinational production sites, not only in Japan but also in Thailand, and import low-cost dispensers (mainly 3ccs) from Thailand.

Finger pumps

Finger pumps are used mostly in skincare and for medical purposes such as nasal/oral sprays. In recent years, finger pumps have faced stiff competition from mini-trigger pumps. Top finger pump manufacturers include Mitani Valve (38%), followed by Yoshino Kogyosyo (36%), Tsubakimoto Kogyo (importer of WR, formerly Calmar products) (10%), Nihon Kolmar (4%) and Taisei Kako (importer of Aptar Pharma) (4%). Canyon, Life Platech and Koi-kekagaku (importer of Coster products) produce the remaining 8%.

Trigger pumps

Trigger-pump sales have grown steadily because mini-trigger pumps have expanded



Fumakilla's new insect repellent in a Hello Kitty design uses a mini-trigger sprayer from Mitani Valve.



Fumakilla's new insect repellent using Mitani Valve's mini-trigger sprayer.

into various applications, such as Fumakila insect repellants and Kao dish washes. The aesthetic and compact benefits of mini-triggers fascinate many marketers and consumers. The market leader is Yoshino Kogyosyo (51%), followed by Canyon (23%), Mitani Valve (16%), Life Platech (6%) and Tsubakimoto Kogyo (2%).

One-drop lotion pumps

Sales of one-drop lotion pumps were slightly higher in 2016 than in 2015. Due to huge demand, high- and middle-range priced make-up and personal care products recovered gradually.

Additionally, hair oils and hair treatments using one-drop lotion pumps are sporting new designs and natural styling agents—phasing out previous hair styling agents—and becoming more popular. The market is strongly led by Yoshino Kogyosho (48%), followed by Mitani Valve (39%) and Nihon Kolmar (13%).

HVD/airless pumps

The market for HVD/airless pumps has increased steadily. Yoshino Kogyosyo (33%) and Mitani Valve (33%) have the top market share, followed by Nihon Kolmar (15%).

Foam pump

Foam pump applications have expanded to hand soap, dish soap and hair dye since the mid-2000s. Recently, foam pumps have ex-

panded to shampoos and conditioners.

The market was led by Yoshino Kogyosyo (55%), followed by Daiwa Can (43%), the parent company of DS Containers of Batavia, IL, a manufacturer of monobloc steel aerosol cans.

Overall, the pump market was led by Yoshino Kogyosyo (53%), followed by Mitani Valve (26%), Canyon (7%), Life Platech (5%), Presco (4%), Daiwa Can (3%) and others.

By way of supplemental data, according to our latest survey, rough production figures of leading global pump manufacturers indicate WestRock produced two billion pumps in 2016, followed by Zhongshan Luencheong Dispensing Pump (one billion), Majesty Packaging Systems (800 million), Aptar Group (750 million), AFA (200 million) and Coster (300 million). SPRAY



Kao's new dishwashing foam uses Yoshino's trigger foamer.

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