

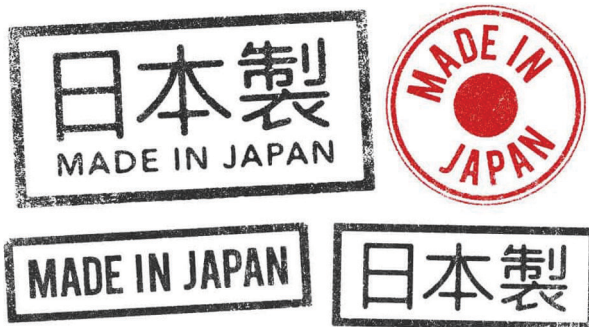
The Pump Market in Japan

Production nears 729 million units in 2018

Editorial staff, Aerosol Industry Newspaper Co., Ltd.

Japan's Aerosol Industry Newspaper Co., Ltd. recently reported that about 729 million pump dispensers, including trigger sprayers, were marketed in Japan last year. This is an approximate 7–8% increase from the 2017's volume.

This figure is the highest recorded ever in the Japanese pump market, owing to so-called “inbound demand,” mostly from the “explosive buying” of Chinese tourists and those of neighboring East Asian countries. There has been a huge amount of foreign visitors to Japan and their demand for “Made in Japan” products, especially cosmetics, toiletries and pharmaceuticals (certainly for electronics) has been increasing since 2016.



In addition, some part of this inbound demand has also shifted to exports or cross-border e-commerce (EC)—what we would call “outbound demand”—to Asian countries. Those demands have boosted the market size for products such as “Made-in-Japan” shampoos, conditioners and skin care cosmetics.

Of course, these inbound/outbound demands have also influenced the aerosol market. In 2017 and 2018, the Japanese aerosol market was estimated to grow slightly from the previous year—a 3.3% and 1.1% increase, respectively. This consecutive growth is due to overseas demand. In comparison, the Japanese people's demand for aerosols, pumps and even cosmetics and most consumer goods, has not increased steadily for the last two years because of a weak Japanese economy.

Regardless, the inbound consumer demand from foreign visitors to Japan and outbound demand, especially from China and other East Asian countries, has grown considerably. As a result, a general increase of orders for bottles and pumps makes for tight supply and demand.

In 2018, about 227 million 1–3cc dispenser pumps were sold. Other sales are estimated to be:

- About 162 million trigger-pumps
- About 115 million finger-pumps
- 105 million one-drop lotion pumps
- 15 million HVD/airless pumps
- 65 million foam pumps
- 38 million “other” types pumps



Chinese tourists shop in Tokyo's Ginza district.

Photo from The Japan Times.

The 3cc dispenser pumps are mainly used for hygiene products, such as shampoo, hair conditioner and body soap. Silicone-free shampoos have sold well because of “smash hit” launches by new marketers, especially **Botanist** shampoo from I-ne Co. Additionally, consumers and marketers have become keen on phrases such as “organic,” “natural ingredients only” or “eco-friendly.” Also, because many consumers have begun to use their own personal products, rather than family-use products, the shampoo and body wash markets have become revitalized.

Furthermore, 1cc dispenser pumps for face-cleansing products have maintained steady sales, mainly because of inbound and outbound demand.

Sales of 1–3cc dispensers have seen an approximate 5% increase over the previous year. The market was led by Yoshino Kogyosyo (holding 57% of market share), followed by Mitani Valve (35%). They have multinational production sites, not only in Japan but also in Thailand. They also import low-cost dispensers (mainly 3ccs) from Thailand.

Continued on page 20



Silicone-free shampoos in 3cc dispenser pumps, such as Botanist, are extremely popular in Japan.



Continued from page 19

Trigger-pump sales have increased by 12% over the previous year because mini-trigger pumps have expanded in various applications. The aesthetic and compact benefits of mini-triggers fascinate many marketers and consumers. Sales of standard-sized trigger spray pumps also grew steadily. Canyon's new trigger-type dispenser can be found on **Attack Zero**, Kao's new laundry detergent. The market leader is Yoshino Kogyosyo (51%), followed by Canyon (23%), Mitani Valve (16%), Life Platech (6%) and Tsubakimoto Kogyo, the importer of Silgan (formerly Calmar) products (2%).

Finger pumps are used mostly for skin care applications or for medicinal purposes such as nasal/oral sprays. In recent years, finger-pumps have faced stiff competition from mini-trigger-pumps. The top finger pump manufacturer is Mitani Valve (44%), followed by Yoshino Kogyosyo (32%), Tsubakimoto Kogyo (10%) and Taisei Kako, importer of Aptar Pharma (4%). Canyon, Life Platech and Koikekagaku (the importer of Coster products) follow.



Attack Zero laundry detergent from Kao features a new trigger pump from Canyon.

Sales of one-drop lotion pumps grew 13% over 2017. Due to high inbound/outbound demand, high- or middle-range-priced cosmetic products recovered gradually. Also, hair oil treatments in one-drop lotion pumps touting natural benefits are replacing existing hair styling products. The market is strongly led by Yoshino Kogyosho (49%), followed by Mitani Valve (43%) and Nihon Kolmar (7%).

The market for high viscosity dispensing (HVD)/airless pumps has increased steadily. Mitani Valve has the top market share (47%), followed by Yoshino Kogyosyo (27%) and Nihon Kolmar (11%). In the past 15 years, foam pump applications have expanded to hand soap, dish soap and hair dye; recently they have expanded to shampoo and conditioner, with this market led by Yoshino Kogyosyo (54%), followed by Daiwa Can (45%). Daiwa Can is the parent company of DS Containers, Batavia, IL—the manufacturer of mono-bloc steel aerosol cans that recently entered the aluminum aerosol container market.

Overall, the pump market was led by Yoshino Kogyosyo (50%), followed by Mitani Valve (30%), Canyon (7%), Daiwa Can (4%) and others. **SPRAY**



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