

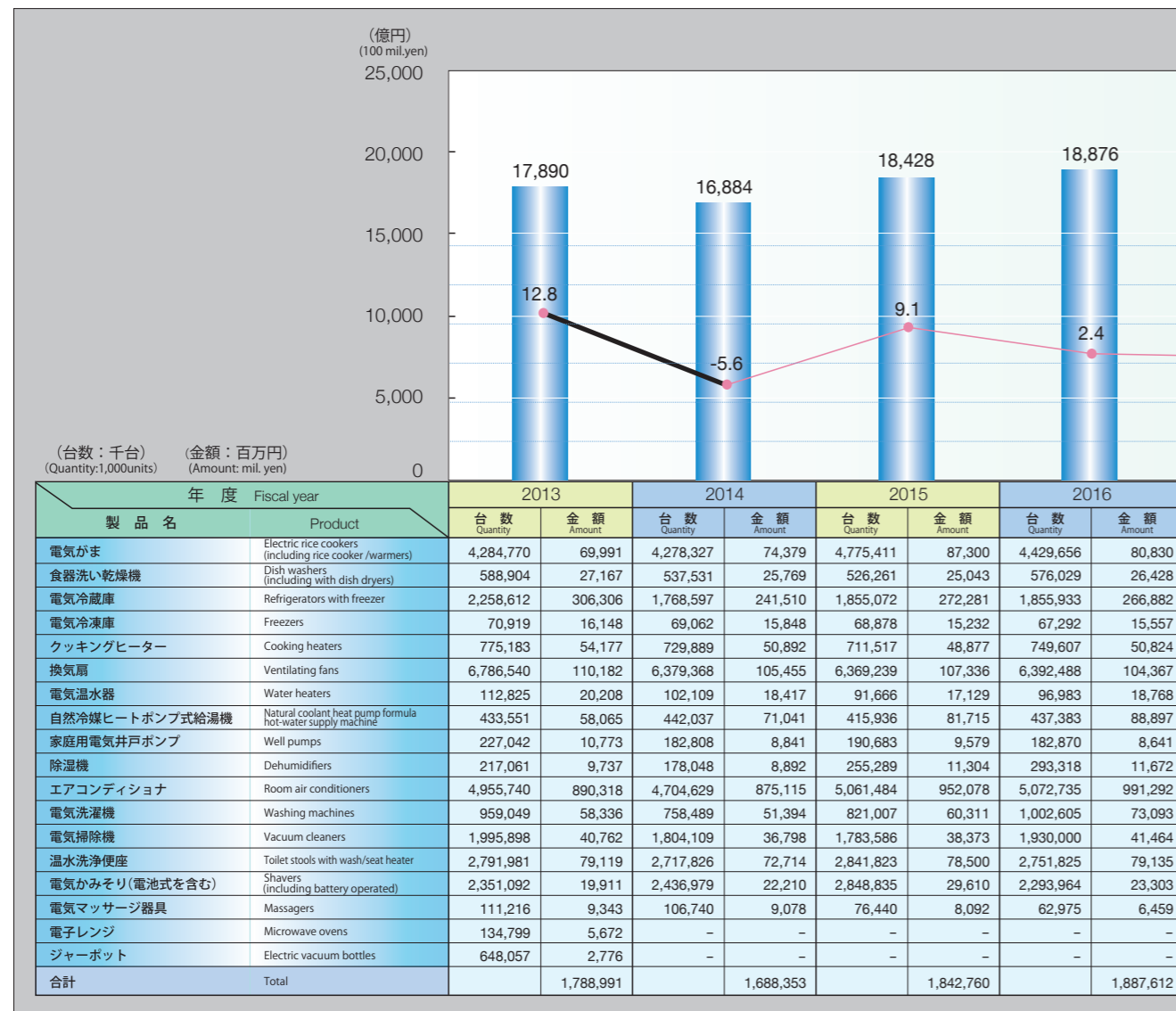
13 日本の家電産業の動向

わが国の家電産業は、グローバル化の展開のなかで、国内には研究開発・生産技術開発などのマザー機能とともに、高機能・高付加価値製品を主体とした生産を残し、普及品、小型製品などは、アジア地域から日本に輸入するアウト・インで対応しています。また、販売先の生活様式や国情に合わせた製品を現地で開発・生産して販売するなど、海外の生産拠点から現地国内や日本以外の国へ製品を販売するアウト・アウトも拡大しており、生産コストの低減や為替リスクを見据えた「最適地生産」が行われています。

近年の家電産業動向を見ると、新型コロナウイルス感染症の拡大以降、新しい生活様式（巣ごもり、在宅ワーク）が定着し、健康清潔志向製品や、宅内環境を快適にする高機能・高付加価値製品の需要が拡大しました。これらの需要は今後も継続することが見込まれます。

今後の白物家電の国内需要は、国内の世帯数の増加は見込めるものの、既に人口減少が始まっている中で更新需要が中心となり、大幅な増加は期待できない状況にあります。また近年、少子高齢化や晩婚・未婚化による少人数・単身世帯の拡大、共働き家庭の増加など、人々のライフスタイルは大きく変化しています。そういった状況において、白物家電の需要を拡大していくためには、ライフスタイルの変化に合わせて多様化しているニーズを見極めた上で、IoTやAIも活用しながら、消費者ニーズを満たす商品開発をすすめることが重要になると考えられます。

家電機器の国内生産額と増減率
Domestic production and growth rates of home electrical appliances

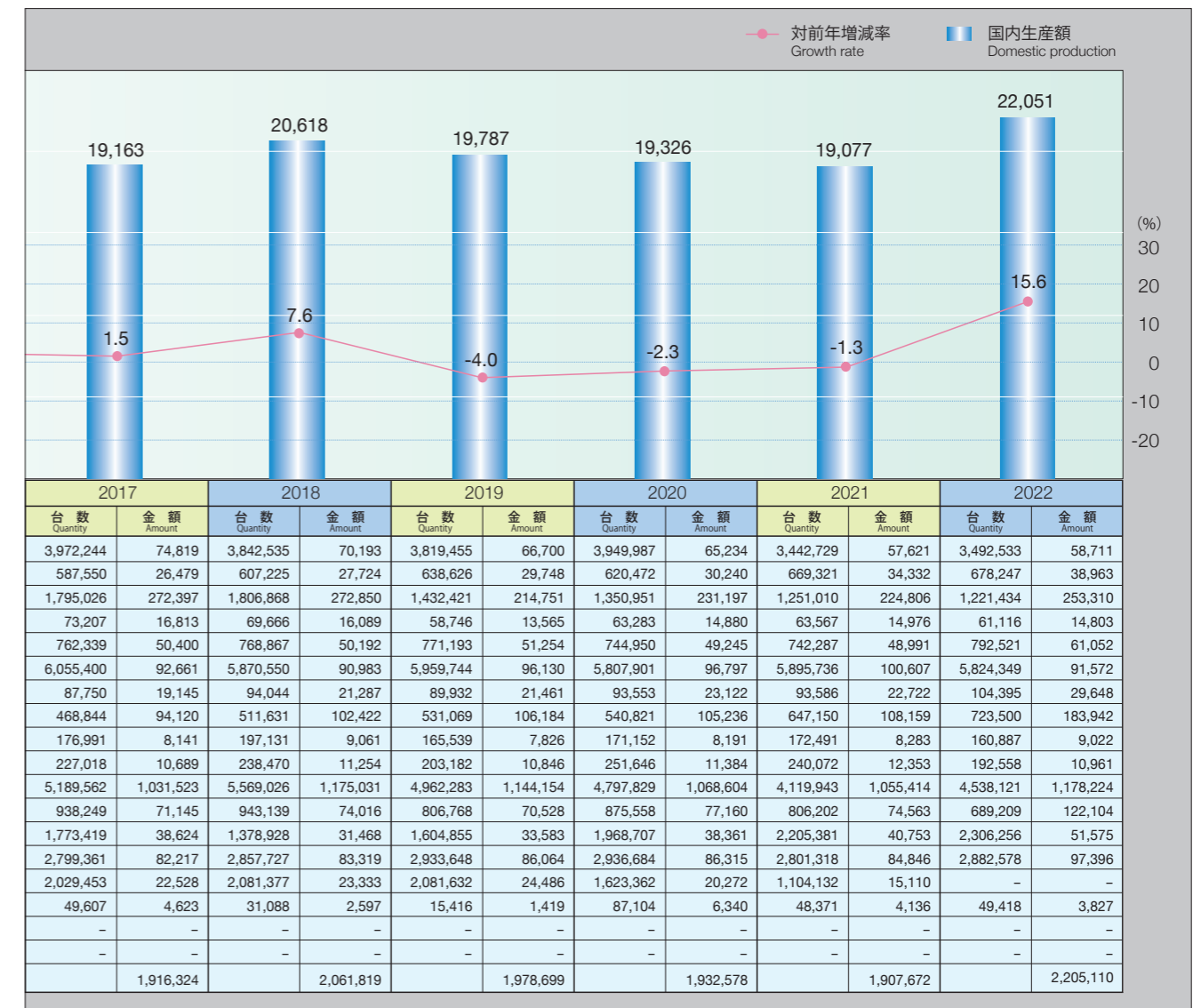


Trends of Home Electrical Appliances Industry in Japan

In the home electrical appliances industry in Japan under increasing globalization, the mother functions such as research & development and production engineering are retained in Japan as well as the production of advanced and high value-added products. Meanwhile, low-end and small products are dealt with on an “Out-In” basis, that is, goods produced in the overseas Asian countries being imported back to Japan. In addition, “Out-Out” sales are also increasing, in which goods are shipped from overseas production bases to their domestic markets or to countries other than Japan. That is, products are developed and produced according to the market needs on the people’s lifestyles and local conditions in the countries. Thus, “production in the optimum locations” is practiced in light of the reduction of production costs and exchange risk.

According to the recent trend of home electrical appliances industry after the spread of coronavirus disease (COVID-19), demand has expanded for health/hygiene products and sophisticated/high value-added products that make home environment comfortable under new lifestyles (Cocooning, Teleworking) established. Hence this trend is expected to continue.

Population has already started to decline, though the number of households is anticipated to increase. Consequently, future demand in Japan for “white goods” of home electrical appliances will not significantly increase, while replacement demand takes a leading part. In addition, people’s lifestyle has largely been changing recently, as the number of few/single-person households is increasing due to decreasing birthrates, aging population, late marriage and unmarried persons. Increasing number of double-income families is also one of the factors for lifestyle change. For expanding the demand of white goods under such circumstances, it is considered important to make sure of the needs diversifying to the lifestyle change and to develop products satisfying consumers’ needs utilizing IoT, AI and other technologies.

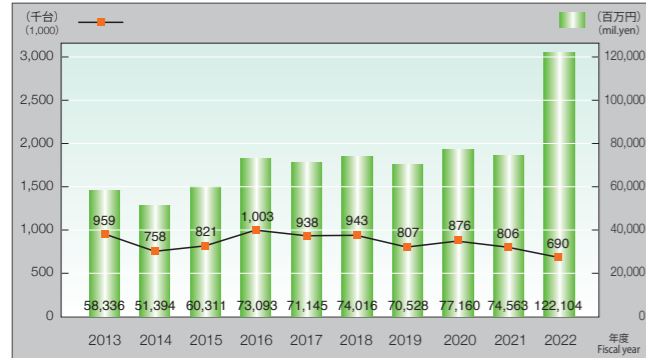


出所：経済産業省 生産動態統計(2023年5月現在の公表値) Source: Current survey of industrial production, METI (as of May, 2023)

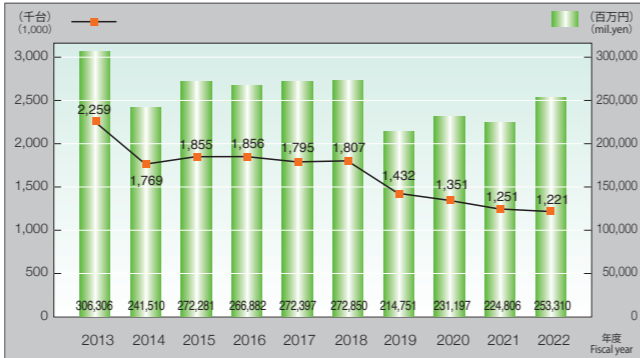
主な家電機器の国内生産推移(2013~2022年度)
Trends of Production of Home Electrical Appliances in Japan (FY 2013 to 2022)

生産(数量) Units
生産額 Amount

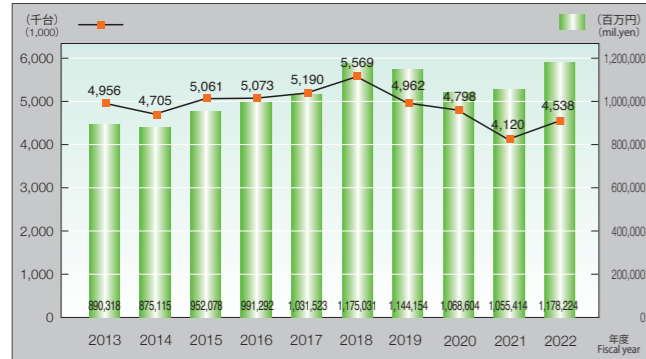
電気洗濯機 Washing machines



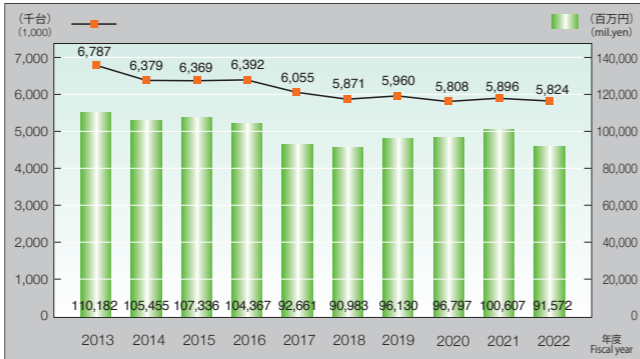
電気冷蔵庫 Refrigerators with freezer



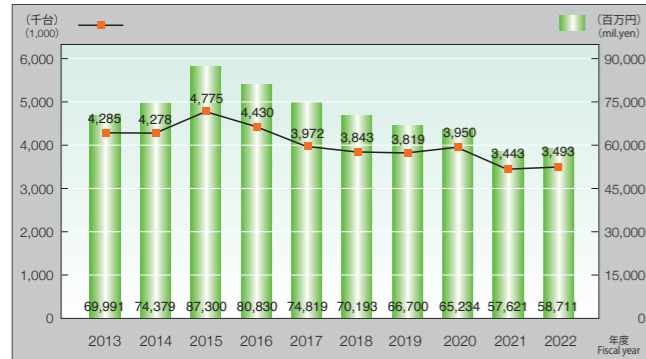
エアコンディショナ Room air conditioners



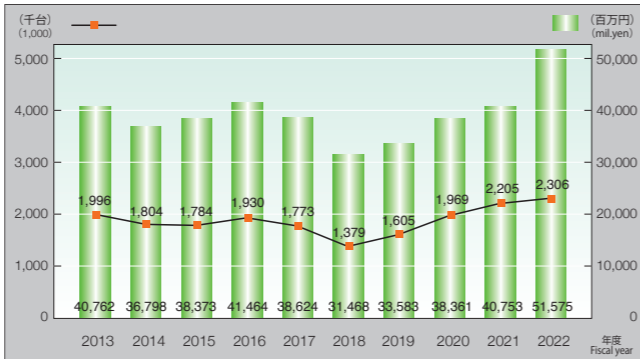
換気扇 Ventilating fans



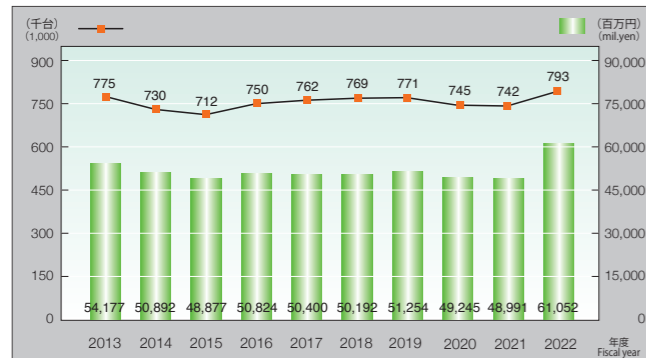
電気かま Electric rice cookers (including rice cooker/warmers)



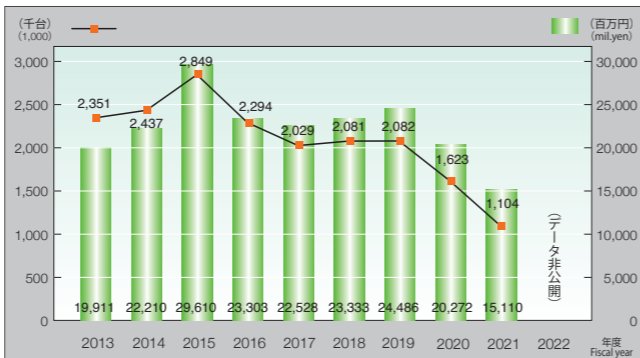
電気掃除機 Vacuum cleaners



クッキングヒーター Cooking heaters



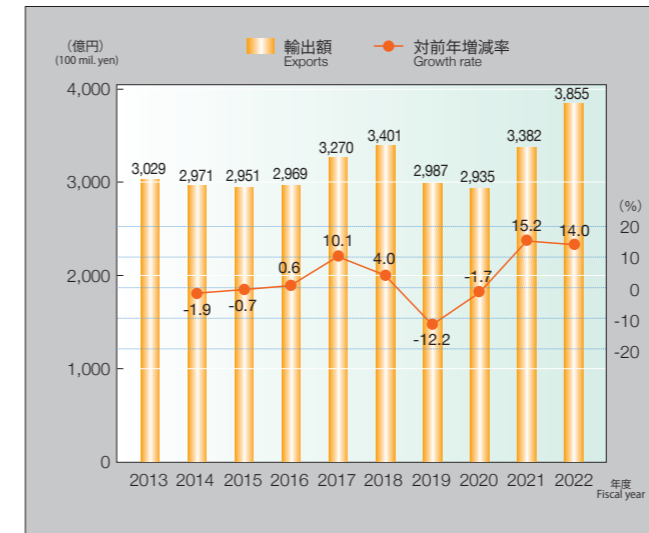
電気かみそり Shavers (including battery operated)



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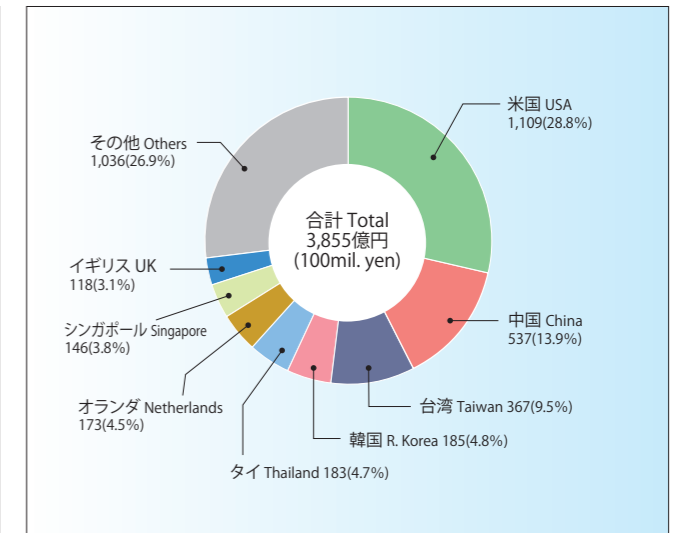
Fiscal year runs from April 1 through March 31 of the following year in Japan.

家電機器の輸出額と増減率
Exports and Growth Rate of Home Electrical Appliances



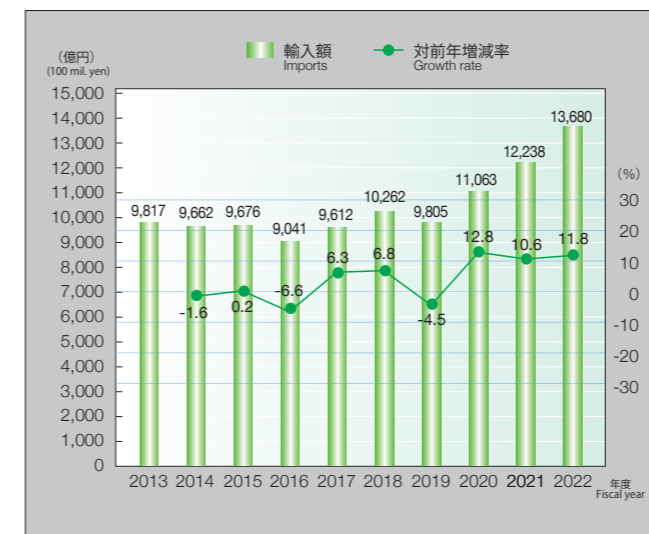
出所：財務省 普通貿易統計(2023年5月現在の公表値)
Source: MOF (as of May, 2023)

家電機器 国・地域別輸出額 (2022年度)
Share of Export of Home Electrical Appliances by country/region in FY2022



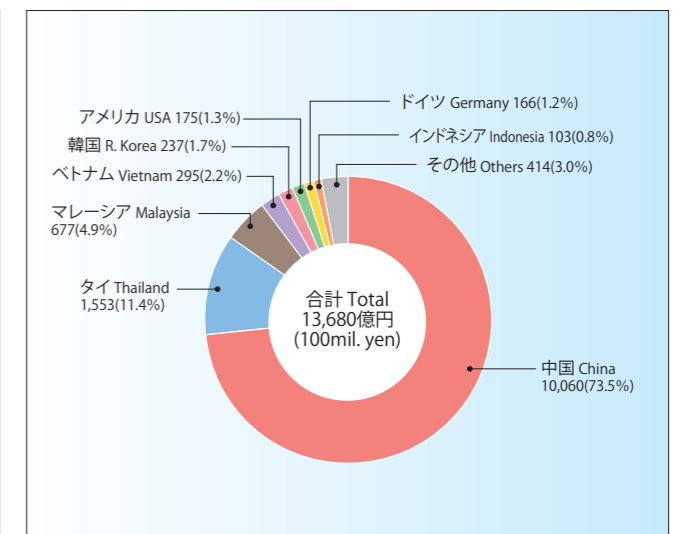
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