

Japan Hair Care Market Assessment, By Treatment [Anti-Dandruff, Hair Loss, Dry & Itchy Scalp, Dull & Frizzy Hair, White-Grey Hair, Others], By Type [Shampoo & Conditioning, Perming & Straightening, Styling Products, Hair Colouring, Others], By Gender [Male, Female, Unisex], By End-user [Personal, Professional], By Distribution Channel [Online, Supermarkets & Hypermarkets, Retail Outlets, Specialty Stores, Departmental Stores, Dealers & Distributors, Pharmacy & Drug Stores, Others], By Region, Opportunities, and Forecast, FY2017-FY2031F

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Abstracts

The Japan Hair Care Market is projected to experience a Compound Annual Growth Rate (CAGR) of 4.18% from FY2024 to FY2031. The market was valued at USD 4.51 billion in FY2023 and is estimated to reach to USD 6.26 billion by FY2031. The growth of the Japan hair care market is being aided by the fact that Japan is one of the biggest markets for cosmetic and personal care goods. When it comes to understanding the chemical composition of hair products, Japanese consumers are highly educated and sophisticated. The market is seeing a high demand for natural ingredients and organic formulations, which is motivating significant manufacturers to release haircare products with natural and clean product labels.

The key players are investing in research and development of the products to gain a larger market share. For instance, the Kao Corporation's Analytical Science Research Laboratories and Hair Care Products Research Laboratories have recently discovered

that ultraviolet (UV) rays are closely related to frizzy hair that develops on the outer layer of the head and causes an uneven appearance by upsetting the alignment of hair bundles. The results of this study were presented at the SCCJ's (Society of Cosmetic Chemists of Japan) 89th annual conference, which took place in Tokyo, Japan, on December 1 and 2, 2022.

The shampoo segment is experiencing positive growth primarily due to the popularity of standard and 2 in 1 shampoo products. This segment also includes sales of anti-dandruff shampoo, kids shampoo, and medicated shampoo. Shampoo formulations incorporate various ingredients to enhance certain qualities, including ease of rinsing, pleasing foam, minimal skin and eye irritation, pleasant fragrance, and affordability. While silicon has been widely used for making hair appear shiny, silky, and smooth, it has been found to damage hair health in the long run. As a result, companies are introducing silicone-free shampoo products to meet the growing demand for healthier hair care options. Some of the notable brand offerings in this category include KAO Merit PYUAN Shampoo, Kumano Yushi Horse Oil Shampoo, and ANGFA Scalp D.

Growing Anxiety About Hair Care

The hair care market, among other industries, is impacted by the significant demographic trend of Japan's ageing population. As individuals age, they often experience changes in hair texture, density, and colour. Hair loss, thinning, and greying become more prevalent concerns among the aging population. This creates a demand for specialized hair care products and treatments that address these specific needs, such as hair growth serums, volumizing shampoos, and anti-greying solutions. Growing demand for hair care products in Japan has also been fuelled by increased hair loss brought on by changing lifestyles and environmental exposure. Due to the growing importance of hair care, the market for specialized products is expanding. While others struggle with breakage and hair fall issues, some have damaged or dry hair.

During the forecast period, the market will benefit from the increased accessibility of specialized products that help to address a variety of hair and scalp-related issues. For instance, in April 2023, Kao Corporation introduced its Space Shampoo Sheet in Japan. It is marketed as an easy-to-use, waterless way to remove impurities from the scalp and hair. One of Japan's most prominent e-commerce shopping malls, Rakuten Ichiba, offers the product in limited quantities.

Consumer Preferences

The Japanese are firm believers in using gentle ingredients to nourish the scalp and hair, regardless of age or hair type. Consumers gravitate towards natural botanical oils that nourish the scalp to enhance overall hair health, similar to their preference for gentle skincare products. Japanese haircare formulates haircare and scalp care products that boost moisture to balance sebum production by treating the scalp as an extension of the skin on the face. Clarifying scalp scrubs also help to clean the hair follicles and remove dead skin cells from the scalp gently. Japanese consumers who are short on time love fuss-free products. Along with other all-in-one treatments like spray-on scalp refresh lotions or multifunctional sticks that mask grey hair and tame flyaways, hair masks that require very little leave-in time are especially well-liked.

In March 2023, Henkel inaugurated its 'J-beauty innovation hub' in Tokyo, where it would harness the extensive expertise of Schwarzkopf and Shiseido Professional in hair colour innovation and trends. The hub will also focus on premium hair and scalp care, anti-hair loss treatments, as well as styling and perm solutions.

Impact of COVID-19

The COVID-19 pandemic had a significant impact on the hair care market in Japan, both in the short term and with potential long-term effects. This caused a shift in consumer priorities, with health and safety taking precedence over beauty and grooming, resulting in a decline in demand for hair care products, particularly for styling and cosmetic purposes. Salon visits were reduced as a result of the pandemic. It even had a significant impact on the economy, leading to job losses and decreased purchasing power. Consumers became more price-sensitive and started opting for more affordable options, resulting in a shift in demand towards budget-friendly hair care products. However, it has also created opportunities for innovative product development, increased e-commerce growth, and a focus on scalp health and hygiene. The full impact of the pandemic on the hair care market in Japan is still unfolding, and the industry is continuously adapting to the changing environment.

Key Players Landscape and Outlook

The Japan hair care market is characterized by intense competition, with numerous key players operating within the industry. A few examples of the key players in the Japanese hair care market are Shiseido Co., Ltd., Kao Corporation and Milbon Co., Ltd. The market is highly competitive, and these players continually introduce new products, engage in marketing campaigns, and strive to capture the attention and loyalty of Japanese consumers. It's important to note that the hair care market is dynamic, and

the strategies and outlook of key players keep evolving over time based on market trends, consumer demands, and competitive landscape.

For instance, Unilever Japan released a haircare brand 'NEXXUS' nationwide on April 10, 2023. It followed a marketing strategy offering a 'full refund campaign if you are not satisfied with the feeling of use'.

Contents

1. RESEARCH METHODOLOGY

2. PROJECT SCOPE & DEFINITIONS

3. IMPACT OF COVID-19

4. EXECUTIVE SUMMARY

5. VOICE OF CUSTOMER

5.1. Demographics (Age/Cohort Analysis – Baby Boomers and Gen X, Millennials, Gen Z; Gender; Income – Low, Mid and High; Geography; Nationality; etc.)

5.2. Market Awareness and Product Information

5.3. Brand Awareness and Loyalty

5.4. Factors Considered in Purchase Decision

5.4.1. Brand Name

5.4.2. Pack Size

5.4.3. Price

5.4.4. Customisation Options

5.4.5. Packaging Type

5.4.6. Inclination Towards Organic Products

5.4.7. Promotional Offers & Discounts

5.5. Purpose of Purchase (Personal Use, Gifting)

5.6. Frequency of Purchase

5.7. Medium of Purchase

5.8. Role of Brand Ambassador or Influencer Marketing on Product/Brand Absorption

6. JAPAN HAIR CARE MARKET OUTLOOK, FY2017-FY2031F

6.1. Market Size & Forecast

6.1.1. By Value

6.1.2. By Volume

6.2. By Treatment

6.2.1. Anti-Dandruff

6.2.2. Hair Loss

6.2.3. Dry & Itchy Scalp

6.2.4. Dull & Frizzy Hair

- 6.2.5. White-Grey Hair
- 6.2.6. Others
- 6.3. By Type
 - 6.3.1. Shampoo & Conditioning
 - 6.3.2. Perming & Straightening
 - 6.3.3. Styling Products
 - 6.3.3.1. Gels/Wax
 - 6.3.3.2. Mousse
 - 6.3.3.3. Hair Spray
 - 6.3.3.4. Others
 - 6.3.4. Hair Colouring
 - 6.3.4.1. Permanent
 - 6.3.4.2. Semi-permanent
 - 6.3.4.3. Demi-permanent
 - 6.3.4.4. Temporary
 - 6.3.4.5. Others
 - 6.3.5. Others
- 6.4. By Gender
 - 6.4.1. Male
 - 6.4.2. Female
 - 6.4.3. Unisex
- 6.5. By End-user
 - 6.5.1. Personal
 - 6.5.2. Professional
- 6.6. By Distribution Channel
 - 6.6.1. Online
 - 6.6.2. Supermarkets & Hypermarkets
 - 6.6.3. Retail Outlets
 - 6.6.4. Specialty Stores
 - 6.6.5. Departmental Stores
 - 6.6.6. Dealers & Distributors
 - 6.6.7. Pharmacy & Drug Stores
 - 6.6.8. Others
- 6.7. By Region
 - 6.7.1. North
 - 6.7.2. Central
 - 6.7.3. South
- 6.8. By Company Market Share (%), FY2023

7. MARKET MAPPING, FY2023

- 7.1. By Treatment
- 7.2. By Type
- 7.3. By Gender
- 7.4. By End-user
- 7.5. By Distribution Channel
- 7.6. By Region

8. MACRO ENVIRONMENT AND INDUSTRY STRUCTURE

- 8.1. Supply Demand Analysis
- 8.2. Import Export Analysis
- 8.3. Value Chain Analysis
- 8.4. PESTEL Analysis
 - 8.4.1. Political Factors
 - 8.4.2. Economic System
 - 8.4.3. Social Implications
 - 8.4.4. Technological Advancements
 - 8.4.5. Environmental Impacts
 - 8.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 8.5. Porter's Five Forces Analysis
 - 8.5.1. Supplier Power
 - 8.5.2. Buyer Power
 - 8.5.3. Substitution Threat
 - 8.5.4. Threat from New Entrant
 - 8.5.5. Competitive Rivalry

9. MARKET DYNAMICS

- 9.1. Growth Drivers
- 9.2. Growth Inhibitors (Challenges and Restraints)

10. KEY PLAYERS LANDSCAPE

- 10.1. Competition Matrix of Top Five Market Leaders
- 10.2. Market Revenue Analysis of Top Five Market Leaders (in %, FY2023)
- 10.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
- 10.4. SWOT Analysis (For Five Market Players)

10.5. Patent Analysis (If Applicable)

11. PRICING ANALYSIS

12. CASE STUDIES

13. KEY PLAYERS OUTLOOK

13.1. Shiseido Co., Ltd.

13.1.1. Company Details

13.1.2. Key Management Personnel

13.1.3. Products & Services

13.1.4. Financials (As reported)

13.1.5. Key Market Focus & Geographical Presence

13.1.6. Recent Developments

13.2. Kao Corporation

13.3. Unilever (Holdings) Japan K.K.

13.4. Kracie Holdings, Ltd.

13.5. NatureLab. Co., Ltd.

13.6. Mandom Corporation (Gatsby)

13.7. Nihonsakari Co., Ltd. (Komenuka Bijin)

13.8. OSHIMATSUBAKI Co., Ltd

13.9. Arimino Co., Ltd.

13.10. Milbon Co., Ltd.

13.11. DARIYA CO., LTD.

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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