

Japan Nail Care Market Assessment, By Product Category [Nail Polish (Liquid Polish, Gel Polish, Top and Base Coat, Others), Nail Polish Removers, Nail Extensions, Nail Accessories, Others], By End Use [Professional, Individual], By Distribution Channel [Online, Offline], By Region, Opportunities, and Forecast, FY2017-FY2031F

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Abstracts

Third-largest economy in the world and one of the best-built infrastructures, Japan is one of the richest nations in the world, with a sizable population that can afford to pay high prices for premium cosmetics. Japan's nail care market is experiencing constant growth and is projected to reach USD 1052.65 million by FY2031 from USD 748.19 million in FY2023. The nation's fascination with beauty and its cultural expectations for beauty has assisted in the growth of a strong nail care sector. Japanese culture views nail care as a crucial component of personal grooming and self-expression, which has created a significant market for nail care goods and services.

The high level of disposable income in Japan is another important factor boosting the nail care business. Due to the scale of the country's population, a variety of foreign and indigenous beauty goods are also in high demand. The market is expected to register a strong CAGR of 4.36% for the forecast period between FY2024 and FY2031. Cosmetic brands are putting more of an emphasis on using natural ingredients to create their nail care goods as the population is more inclined towards using non-toxic and organic products. Over the past few years, Japan's traditional nail art forms have gained popularity and have been a major trend globally, along with its innovative methods of manicuring and integrating technology in it.

Tradition Art is a Trend

Japanese nail art, commonly referred to as 'kawaii' nail art, is a type of nail art that has its roots in Japan. In 2023, it became incredibly popular in Japan and across the world. It is renowned for its meticulous attention to detail, vibrant colour scheme and integration of cultural aspects like kawaii and anime characters. This art requires small, fine brushstrokes, this is one of the distinguishing characteristics of this Japanese nail art, which is used to produce intricate designs. These designs can incorporate pictures of people, pets and even flowers. The designs are generally created on top of a base colour that has been painted on the nails. Artists frequently use up to five or six different colours in a single art. This nail art has evolved over time and uses some sophisticated techniques which even add 3D components, like tiny figurines or food items.

Male Nail Care Gaining Popularity

Genderless fashion and cosmetics brands have been increasing in Japan for the past few years and there has been a significant shift in beauty trends where males are increasingly paying attention to their appearance and grooming including nail care. Nail care among men in Japan is particularly focused on preventing dryness and cracking. In line with this, there is a growing availability of men's exclusive nail salons and also, the brands are launching gender-neutral nail polishes. For example, iLLO, a cosmetics brand is offering gender-neutral nail polishes including glitter and sheer. Such trends are set to break the gender stereotypes in Japan.

Government Regulations

The Pharmaceutical and Medical Devices (PMD) Act, which is administered by the Ministry of Health, Labour and Welfare (MHLW), governs cosmetic products. Nail care products in Japan are regulated according to this cosmetics act, no specific law has been enacted for nail care products. General cosmetics and Quasi-drugs are the two categories into which cosmetics are divided in Japan. Nail care products are considered in the category of general cosmetics. Manufacturers and importers must finish the relevant regulatory processes for their cosmetic items before they may apply for marketing authorisation depending on the product category.

A Solid Nail Salon Industry

In Japan, the nail salon sector is well-established and offers a variety of services. In the world of nail art, Tokyo has long been a trendsetter, and anyone can get just much

anything on their tips, from garish 3D art to an elegant diamant? design. Consumers may easily get professional nail care thanks to nail salons' professional manicures, pedicures, nail extensions, and nail art, like kawaii characters, floral designs, ombre, gradient effects and geometric patterns . The demand for the nail care products used in nail salons is driven by their popularity. Some of the best nail salons in Japan which cater most English-speaking customers are Nail Cottage, Nail Salon Pinky, Asian Nail & Hair Salon, Espoir and many more . Each nail salon provides beautiful nail art and wonderful Japanese hospitality where one can witness the superb skill of skilled Japanese nail artists.

Impact of COVID-19

COVID-19 in Japan brought both challenges and opportunities to the Japan nail care market. Businesses in Japan suffered a heavy impact from covid-19 restraining policies like lockdowns, curfews, social distancing and more. Due to government-imposed lockdowns and social segregation measures, nail salons in Japan had to temporarily close or operate under restricted circumstances during the early stages of the pandemic. This caused a sudden decline in demand for professional nail care services and salon traffic to collapse. The pandemic also affected consumer behaviour towards nail care products as consumers opted to buy more products from e-commerce channels and brand websites rather than the retail market.

Key Players Landscape and Outlook

The need for high-quality nail care products, growing consumer knowledge of the importance of nail health, the popularity of nail art and nail extensions and other factors all contribute to the favourable market outlook for the Japanese nail care market. Product innovations in the market are anticipated to include long-lasting formulas, natural and organic nail care alternatives, and practical at-home nail care options. Additionally, it is anticipated that the promotion of nail care trends and tutorials through social media and online platforms would further fuel market expansion. The trend towards at-home nail care has also been driven by the COVID-19 pandemic, opening doors for businesses to target this new consumer group. Japan's domestic brands and its salon industry are popular due to their quality products and excellent service respectively.

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

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