

Japan Cosmetics Market By Product Type (Skin Care, Hair Care, Makeup, Fragrance, Others), By Sales Channel (Supermarkets/Hypermarkets, Specialty Stores, Departmental Stores, Online, and Others), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

Japan Cosmetics Market was valued at USD 31.29 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.64% through 2029. The Japan cosmetics market is a dynamic and highly influential sector within the beauty and personal care industry. Renowned for its innovation, quality, and adherence to tradition, the Japanese cosmetics market is characterized by a deep cultural appreciation for skincare and beauty products. Here, we provide an overview of the key factors that define the Japan cosmetics market.

In Japan, skincare is not merely a routine; it's a way of life. A rich cultural tradition that dates back centuries, skincare and beauty rituals are deeply ingrained in Japanese culture. The pursuit of flawless, radiant skin is a cultural norm, and this mindset has made Japan one of the most significant cosmetics markets in the world.

Japan is renowned for its cutting-edge innovation in the cosmetics industry. Japanese cosmetics companies are at the forefront of research and development, constantly pushing the boundaries to create products that not only meet but often exceed consumer expectations. Technological advancements have resulted in the development of unique and effective skincare solutions, such as anti-aging products, sunscreen formulations, and high-quality serums.

Japanese cosmetics are celebrated for their use of high-quality, natural ingredients. Japanese skincare products often feature ingredients like green tea, rice bran, seaweed, and hyaluronic acid. These natural components are known for their nourishing and revitalizing properties, and their inclusion in cosmetic formulations reflects the Japanese commitment to creating products that benefit the skin.

One of the most distinctive features of the Japanese cosmetics market is the multi-step skincare routine. Japanese consumers typically follow a rigorous regimen that involves cleansing, toning, moisturizing, and protecting the skin. The "double cleansing" method, in particular, is a common practice in Japan, which involves both oil-based and water-based cleansers to ensure thorough cleansing.

Sun protection is a paramount concern in Japan, as consumers are highly conscious of the potential harmful effects of UV radiation on the skin. Sunscreen is an essential part of daily skincare, and Japanese cosmetics companies produce a wide variety of sun protection products, including innovative formulations with high SPF ratings and broad-spectrum protection.

In conclusion, the Japan cosmetics market stands as a testament to the cultural significance of skincare and beauty in the country. Characterized by innovation, high-quality ingredients, a multi-step skincare routine, and a commitment to sun protection, the market reflects the deep-seated values and preferences of Japanese consumers. With its focus on tradition and technology, the Japan cosmetics market remains a dynamic and influential force in the global cosmetics industry.

Key Market Drivers

Highly Discerning Consumer Base

Japan's cosmetics market is driven by a highly discerning consumer base with a strong emphasis on skincare and beauty. Japanese consumers are known for their meticulous approach to beauty routines and their preference for high-quality products. This consumer demand has prompted both domestic and international cosmetic companies to continuously innovate and provide cutting-edge products to meet the specific needs and preferences of the Japanese market.

Japanese consumers prioritize the health and appearance of their skin, leading to a significant focus on skincare products such as cleansers, moisturizers, serums, and sunscreens. The pursuit of "mochi-hada," or soft and supple skin, is a common goal,

and consumers are willing to invest in products that promise visible results. This discerning consumer base has pushed companies to develop unique formulations, conduct thorough research, and create specialized products tailored to the Japanese skincare culture.

Moreover, Japanese consumers are known for their loyalty to established brands with a reputation for quality. This has led to enduring success for some well-known domestic brands, and their innovative products continue to drive market growth. Companies that can build trust and offer superior product quality and performance can tap into this consumer base, driving their success in the Japanese cosmetics market.

Innovative Product Development and Technology Advancements

Innovation is a key driver of the Japanese cosmetics market. Japanese companies invest heavily in research and development, constantly seeking to develop new and improved products. These innovations cover a wide range of areas, including skincare, makeup, hair care, and more. A few notable examples of innovative products and technologies that have driven the market include:

Anti-Aging Technologies: Japan has been a pioneer in anti-aging skincare products, with the introduction of technologies like retinol, collagen, and hyaluronic acid. These innovations have attracted consumers looking to maintain youthful and radiant skin.

Sun Protection: With a strong emphasis on sun protection, Japanese companies have developed highly effective sunscreens that provide broad-spectrum protection while maintaining lightweight, non-greasy textures. This innovation addresses the growing concerns about skin health and aging.

Sheet Masks: Sheet masks, a product that originated in South Korea but gained immense popularity in Japan, have become a staple in skincare routines. These masks provide a quick and convenient way to deliver concentrated skincare ingredients to the skin, driving consumer engagement.

Beauty Devices: The Japanese market has seen the rise of beauty devices that utilize technology like microcurrents, LED therapy, and ultrasonic waves to enhance skincare routines. These devices offer consumers salon-like experiences at home.

Natural and Sustainable Products: In response to the global shift toward natural and sustainable cosmetics, Japanese companies are increasingly incorporating natural

ingredients and environmentally friendly practices in their products and packaging.

Innovative product development not only caters to local preferences but also creates export opportunities for Japanese cosmetic companies. Their commitment to research and technology advancements has allowed them to compete on a global scale.

Rising Beauty and Skincare Awareness

The third driver is the increasing awareness of beauty and skincare, which has grown beyond traditional gender and age boundaries. Japanese society places a strong emphasis on appearance, and both men and women of all ages are seeking to enhance their beauty and maintain healthy skin.

This rise in awareness is due in part to several factors:

Social Media and Influencers: The influence of social media and beauty influencers has significantly impacted consumer behavior. Platforms like Instagram and YouTube have become essential for cosmetics and skincare marketing. Japanese influencers and beauty gurus have helped educate and promote products, leading to increased awareness and sales.

Cultural Trends: The "kawaii" (cute) culture in Japan places a strong emphasis on personal grooming, encouraging individuals to invest in cosmetics and skincare products. This cultural trend has expanded to include a broad demographic.

Anti-Pollution and Skin Protection: As environmental concerns, particularly air pollution, have risen, so has the demand for products that offer protection against skin damage caused by pollution and UV radiation.

Health and Wellness: The desire for overall health and wellness extends to skincare. Products that incorporate natural, organic, and clean ingredients appeal to consumers seeking a holistic approach to beauty.

Aging Population: Japan's aging population has generated a significant market for anti-aging and skincare products, as mature consumers are looking for ways to maintain youthful and healthy skin.

Key Market Challenges

Aging Population and Declining Birth Rates

Japan is known for its aging population and declining birth rates, which have far-reaching implications for the cosmetics industry. These demographic trends pose several challenges:

Shifting Consumer Base: With a growing proportion of elderly individuals and a smaller youth population, the cosmetics market must adapt to the changing consumer base. While older consumers are increasingly interested in anti-aging and skincare products, there is a need for innovation in products that cater to the specific needs of this demographic.

Decline in Demand: A smaller population of young consumers translates to reduced demand for cosmetics, particularly in categories like makeup. This decline in demand affects both domestic and international cosmetic brands operating in Japan.

Changing Preferences: As the population ages, there is a shift in consumer preferences towards products that focus on skin health and wellness. Products that offer long-term benefits, such as anti-aging serums and sunscreens, gain more prominence.

To address these challenges, cosmetic companies in Japan need to create tailored products that meet the evolving needs of the aging population. This includes developing anti-aging solutions, skincare regimens, and marketing strategies that resonate with older consumers.

Strict Regulations and Product Testing

Japan has rigorous regulations governing cosmetics, which can pose challenges for businesses in the industry:

Complex Registration Process: The process of registering cosmetic products in Japan is highly detailed and often time-consuming. It requires extensive documentation and testing, including safety and efficacy assessments. This complexity can be a barrier for new entrants and may slow down the introduction of innovative products.

Animal Testing Restrictions: Japan has traditionally used animal testing for cosmetics, which has faced backlash from animal rights activists. In recent years, Japan has introduced restrictions on animal testing, aligning with global trends. While this is a positive development, it also challenges companies to find alternative testing methods

and adapt to new regulations.

Labeling and Ingredient Regulations: The market also enforces strict regulations on labeling and ingredient safety. Manufacturers must comply with ingredient restrictions, and all labeling and marketing materials must adhere to specific guidelines. This can be a burden for businesses, especially those looking to import products into Japan.

To navigate these challenges, companies must prioritize compliance, invest in research and development to meet regulatory requirements, and explore alternative testing methods. Collaboration with regulatory bodies and industry associations can also be instrumental in addressing these issues.

Increasing Competition from International Brands

While the Japanese cosmetics market has traditionally been dominated by domestic brands, international brands are making significant inroads, intensifying competition:

Globalization: International brands have recognized the potential of the Japanese cosmetics market and have actively expanded their presence. They often come with established global reputations, sophisticated marketing strategies, and a diverse product range.

Consumer Interest in Foreign Brands: Japanese consumers are increasingly open to trying foreign brands, drawn by the appeal of unique ingredients, branding, and cultural influences. This has prompted local consumers to explore non-Japanese products.

Market Saturation: The market's saturation and limited room for expansion within Japan's borders encourage both domestic and international companies to compete fiercely for market share. As a result, price wars and marketing battles intensify.

To overcome the challenges posed by increased competition, domestic companies can focus on leveraging their deep understanding of local consumer preferences, engage in continuous innovation, and build brand loyalty. International brands, on the other hand, need to respect local customs, adapt their products to Japanese tastes, and invest in effective marketing strategies to establish a strong foothold.

Key Market Trends

Emphasis on Natural and Clean Beauty

The Japan cosmetics market has witnessed a significant shift towards natural and clean beauty products. Consumers are increasingly concerned about the ingredients they apply to their skin and their potential environmental impact. This trend is driven by a growing awareness of the importance of sustainable and eco-friendly products.

Japanese consumers are gravitating towards cosmetics made with natural, organic, and plant-based ingredients. These products are perceived as safer and healthier for the skin. In response, cosmetic companies in Japan are reformulating their products to exclude harmful ingredients such as parabens, sulfates, and artificial fragrances. Furthermore, there is a strong focus on cruelty-free and vegan products, which resonate with consumers who prioritize ethical and sustainable beauty choices.

Japanese cosmetics brands are also increasingly adopting eco-friendly packaging, using recyclable materials and minimizing excess packaging. This trend aligns with Japan's broader efforts to reduce plastic waste and promote sustainability.

The demand for clean and natural beauty products is not limited to skincare and makeup but extends to hair care and even fragrance. Japanese consumers are seeking comprehensive beauty solutions that are both effective and environmentally responsible.

Advanced Technology and Innovation

Japan has long been known for its innovation and technological prowess, and this characteristic is making a significant impact on the cosmetics market. The use of cutting-edge technology and science in the development of cosmetic products is a dominant trend in Japan.

One notable innovation is the use of nanotechnology to create highly effective skincare and makeup products. Nanoparticles can deliver active ingredients deep into the skin, enhancing their performance. For example, sunscreen formulations with nanoparticle technology provide better UV protection without the heavy or greasy feel of traditional sunscreens.

Another innovation is the use of artificial intelligence (AI) and augmented reality (AR) in the cosmetics industry. These technologies are employed to create virtual try-on experiences, allowing customers to test makeup and skincare products virtually before making a purchase. This not only enhances the shopping experience but also reduces

the need for in-store product sampling, which became particularly relevant during the COVID-19 pandemic.

Furthermore, Japan has been at the forefront of biotechnology in cosmetics. Companies are utilizing biotechnological methods to develop ingredients that mimic the skin's natural processes, leading to products that are more compatible and effective. For example, some skincare brands are using fermented ingredients and probiotics to promote healthy skin flora and improve skin conditions.

Aging Population and Anti-Aging Solutions

Japan has one of the world's most rapidly aging populations, and this demographic shift is profoundly influencing the cosmetics market. The desire for effective anti-aging products and solutions is a prominent trend.

Japanese consumers, especially those in the older demographic, are seeking cosmetics and skincare products that address concerns related to aging, such as wrinkles, sagging skin, and age spots. In response, cosmetic companies are developing and marketing products specifically designed to combat these signs of aging.

Key areas of innovation in this segment include the use of retinoids, peptides, and hyaluronic acid in anti-aging skincare. These ingredients have been proven to stimulate collagen production, improve skin texture, and retain moisture, helping to reduce the visible signs of aging.

Cosmetic brands are also focusing on sun protection, as UV radiation is a primary cause of premature aging. Sunscreen products with high sun protection factor (SPF) and broad-spectrum coverage have gained popularity. Additionally, "beauty from within" products, such as collagen supplements, are becoming increasingly common, as they are believed to support skin health and reduce the appearance of wrinkles.

Segmental Insights

Product Type Insights

The Japan cosmetics market is a dynamic and influential sector that has earned a global reputation for its innovation, quality, and meticulous attention to detail. Within this thriving industry, skin care products have carved out a substantial and enduring share, reflecting the Japanese culture's strong emphasis on skin health, beauty, and

meticulous skincare routines.

Japanese culture places great importance on skincare, considering it an essential element of personal grooming and self-care. The pursuit of flawless, radiant, and youthful skin is deeply ingrained in Japanese society, and this cultural reverence for skin care products has propelled the category to a significant position within the cosmetics market.

Japanese consumers have high expectations when it comes to the quality and efficacy of their skincare products. The Japanese cosmetics industry has a reputation for producing high-quality, innovative, and scientifically advanced skincare formulations. This commitment to research and development has resulted in cutting-edge products that cater to a broad spectrum of skin types and concerns.

The skin care category in the Japan cosmetics market offers a diverse array of products, ranging from traditional Japanese beauty rituals to modern, technologically advanced solutions. This diversity allows consumers to choose products that align with their individual preferences, skin types, and specific concerns. Some of the popular skincare products in Japan include:

Cleansers and Makeup Removers: Japan offers an assortment of gentle yet effective cleansers and makeup removers, including oil-based and water-based options, to cater to different skin types.

Serums and Essences: These highly concentrated formulations address various skin concerns, such as hydration, brightening, and anti-aging.

Moisturizers: Japan boasts a range of moisturizers, from lightweight gels to rich creams, designed to keep the skin hydrated and healthy.

Sheet Masks: Sheet masks are a beloved skincare ritual in Japan, offering quick and targeted solutions for various skin issues.

Sunscreen: Japan places significant emphasis on sun protection, and its sunscreen products are known for their effectiveness, light textures, and inclusion of additional skincare benefits.

Anti-Aging Products: Japan has a robust market for anti-aging products, including products with collagen, hyaluronic acid, and other ingredients that promote youthful

skin.

The influence of South Korean beauty trends, often referred to as K-Beauty, has significantly impacted the Japanese skincare market. Consumers in Japan have embraced K-Beauty products and practices, leading to the introduction of innovative and trend-setting items such as multi-step skincare routines and unique ingredients.

Japanese skincare products often incorporate natural ingredients rooted in traditional Japanese beauty rituals. Ingredients like green tea, rice bran, sake, and seaweed are frequently utilized for their nourishing and beneficial properties. This fusion of modern science with time-honored traditions is a hallmark of Japanese skincare.

Japanese consumers are well-informed about skincare, and they take the time to educate themselves about ingredients, product formulations, and the best practices for achieving healthy skin. This level of knowledge drives a demand for skincare products that are backed by scientific research and proven results.

Sales Channel Insights

The cosmetics market in Japan is renowned for its innovation, quality, and diverse product offerings. In recent years, online channels have carved out a significant share in this market, reshaping how Japanese consumers discover, purchase, and experience cosmetics and skincare products. This transformation is driven by several factors that have made online channels a dominant and influential force within the industry.

The growth of e-commerce in Japan has been remarkable, and the cosmetics sector has been no exception. Online retailers and e-commerce platforms have gained popularity due to their convenience, product variety, and often competitive pricing. Japanese consumers, like many around the world, have embraced the ease of shopping for cosmetics from the comfort of their homes or on-the-go using their smartphones or computers.

Online channels offer an extensive selection of cosmetics products, catering to a diverse range of consumer preferences. Shoppers can explore a multitude of brands, formulations, and price points, which might not be as readily available in physical stores. This wealth of options allows consumers to discover niche brands, specialty products, and international cosmetics, contributing to the appeal of online shopping.

Online retailers utilize data-driven algorithms and consumer profiles to provide

personalized product recommendations. Through user history and preferences, these platforms offer tailored suggestions, helping consumers discover new products that match their needs and tastes. The ability to receive product recommendations based on individual preferences is a compelling feature of online cosmetics shopping.

Online channels offer comprehensive product information and customer reviews, allowing shoppers to make informed decisions. Consumers can delve into the details of ingredients, formulations, and usage instructions before making a purchase. Additionally, reviews and ratings from other users provide valuable insights and help build trust in the products.

Online shopping provides the ultimate convenience for consumers. With just a few clicks, shoppers can explore, compare, and purchase cosmetics products from virtually anywhere with an internet connection. This level of accessibility is especially appealing in a fast-paced society like Japan.

Online channels frequently run exclusive promotions, discounts, and limited-time offers. These incentives attract consumers looking for cost-effective options and unique deals. The ability to hunt for bargains and capitalize on special discounts is a notable advantage of online cosmetics shopping.

Regional Insights

Japan is renowned for its thriving cosmetics industry, and two regions that contribute significantly to this market's success are Hokkaido and Tohoku. These regions, situated in the northern part of Japan, have played a substantial role in shaping the cosmetics landscape in the country. Several factors contribute to their significant share in the Japan cosmetics market.

Hokkaido, Japan's northernmost island, is known for its pristine natural environment and abundant natural resources. The region's clean air, pure water, and fertile soil provide an ideal environment for the cultivation of botanical ingredients used in cosmetics. Hokkaido's lavender fields, for example, yield high-quality lavender essential oil, a popular component in skincare and aromatherapy products.

Tohoku, located just south of Hokkaido, boasts its own share of natural resources. The region's rice bran oil and sake (rice wine) are key ingredients in skincare products. Sake, in particular, is rich in amino acids and enzymes that are believed to have beneficial effects on the skin, making it a sought-after ingredient in Japanese cosmetics.

Both Hokkaido and Tohoku have a long history of traditional craftsmanship and artisanal production. This heritage extends to the cosmetics industry, where local producers often emphasize quality, authenticity, and handcrafted processes. Consumers are drawn to products that reflect this artisanal approach, which includes carefully curated formulas and unique packaging.

The global cosmetics industry is experiencing a shift towards wellness and natural products, and this trend is evident in Hokkaido and Tohoku's contributions to the market. Consumers are increasingly seeking products that are gentle on the skin and free from harsh chemicals. Both regions are well-positioned to meet these demands, as their cosmetics often incorporate natural, locally sourced ingredients with minimal additives.

Hokkaido and Tohoku have fostered a growing number of local cosmetics brands that cater to both domestic and international markets. These brands often emphasize innovation and originality in their product development. They leverage the region's resources, traditions, and natural ingredients to create unique formulations that stand out in the competitive cosmetics market.

Tourism plays a pivotal role in boosting the cosmetics market in Hokkaido and Tohoku. Visitors from around the world are exposed to and often purchase local cosmetics as souvenirs, promoting brand recognition and boosting sales. The cultural experiences and traditions of these regions also influence the types of cosmetics available, with products that celebrate local festivals, rituals, and traditions.

Key Market Players

Unilever PLC

Procter & Gamble Co

Kao Corporation

Mandom Corporation

Lion Corporation

Shiseido Company

L'Oreal SA

AS Watson Group

SK-II

Makanai

Report Scope:

In this report, the Japan cosmetics market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Japan Cosmetics Market, By Product Type:

Skin Care

Hair Care

Makeup

Fragrance

Others

Japan Cosmetics Market, By Sales Channel:

Supermarkets/Hypermarkets

Specialty Stores

Departmental Stores

Online

Others

Japan Cosmetics Market, By Region:

Hokkaido &Tohoku

Chubu

Chugoku

Kyushu

Rest of Japan

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Japan cosmetics market.

Available Customizations:

Japan Cosmetics Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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