

Toiletries Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic toiletries market with the following conditions:

1. Research period: From September to October, 2016
2. Research targets: Toiletries manufacturers and other related companies
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, and literature research

What is the toiletries market?

The toiletries market in this research mainly indicates products sold through miscellaneous daily goods. The following 50 items from 5 categories are targeted for the survey: 7 items from clothing related products (including synthetic detergents for clothing, fabric softer, etc.), 16 items from household products (including kitchen detergents, wrapping films, air freshener/fragrance, insecticides, etc.), 10 items from facial/body care products (including body shampoos, hand soaps, etc.), 6 items from oral care products (including tooth pastes, mouthwashes, etc.), and 11 items from sanitary products (including toilet papers, tissue papers, diapers, etc.) The figures are calculated based on the shipment value at manufacturers.

◆ Key Findings

■ **FY2015 Toiletries Market Achieved 1,837.469 Billion Yen, 103.3% on Y-o-Y Basis**

The toiletries market in FY2015 attained 1,837.469 billion yen, 103.3% of the size of the previous fiscal year, based on the shipment value at manufacturers. In addition to practicability of effectiveness and efficacy, toiletries products appeal to users' emotions to bring about comfort and well-being lifestyles, which diversified consumer values and expanded the FY2015 market. With regard to the market by category, sanitary products have been markedly well, backed by aging society and favorable inbound demand by foreign visitors. Oral care products have also increased, because growing consciousness of oral care achieving highly sanitary conditions, hygienic comfort, etiquette, and cleanliness.

■ **Domestic Keys are Elderly Population, Personalization, Men's Products, Overseas is Cross-Border e-Commerce**

The promising factors of the toiletries market for the future are considered as follows: Promotion of value-added products to middle-aged and elderly people with large population, supporting of personalized use of products for growing number of single working women and single households, and expansion of men's products such as those for grooming. While some kind of measures should be taken to the shrinking inbound tourism demands, many manufacturers of toiletries products are considering entering cross-border ecommerce business in order to enhance development of the Chinese market.

◆ Report format:

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Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

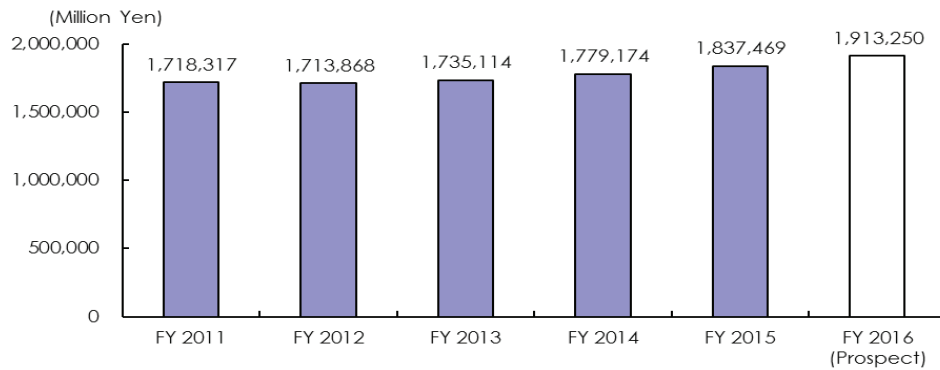
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■ **Figure 1: Transition of Toiletries Market Size**



(Unit: Million Yen, %)

FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016 (Prospect)
1,718,317	1,713,868	1,735,114	1,779,174	1,837,469	1,913,250
100.3	99.7	101.2	102.5	103.3	104.1

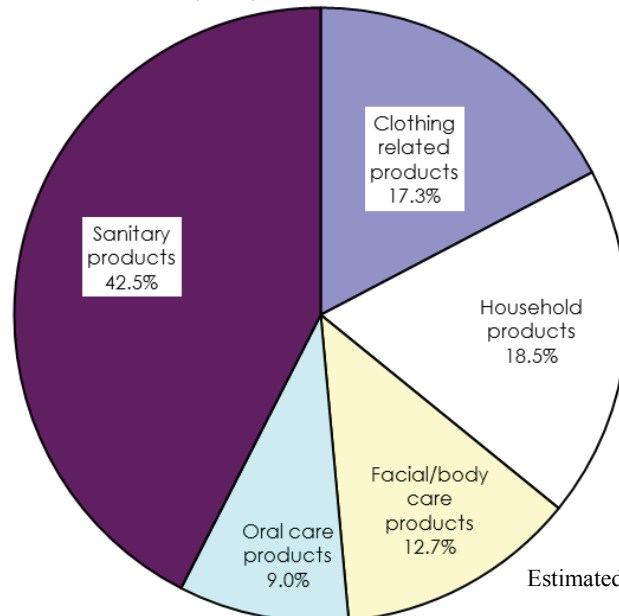
Notes:

Survey by Yano Research Institute

1. The market size is based on the shipment value at manufacturers.
2. The toiletries market in this research targets the following 50 items from 5 categories: 7 items from clothing related products, 16 items from household products, 10 items from facial/body care products, 6 items from oral care products, and 11 items from sanitary products.

■ **Figure 2: Composition Ratio of Toiletries Market by Category**

**FY2015 Domestic Toiletries Market Size:
1,837,469 Million Yen**



Estimated by Yano Research Institute

Notes:

3. The market size is based on the shipment value at manufacturers.
4. The toiletries market in this research targets the following 50 items from 5 categories: 7 items from clothing related products, 16 items from household products, 10 items from facial/body care products, 6 items from oral care products, and 11 items from sanitary products.