**EXECUTIVE SUMMARY**

Beauty and personal care in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

**MARKET DATA**

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**DISCLAIMER**

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**2022 DEVELOPMENTS**

Greater segmentation within category to focus on young children rather than babies

Local player Natural Science conducts research to reassure parents when applying skin care to babies

Development of skin care for both recovering mothers and babies

**PROSPECTS AND OPPORTUNITIES**

Increasing focus on mild formulations for baby and child-specific toiletries

Gift sets for new mothers and babies offer higher specific value

Baby and child-specific sun care offers further growth and development potential

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**Bath and Shower in Japan**
KEY DATA FINDINGS

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Overall demand for hand sanitisers and liquid soap remain above pre-pandemic levels due to habit persistence
Bath additives continues to appeal due to relaxation trend
Mild foaming products add value to body wash/shower gel

PROSPECTS AND OPPORTUNITIES

Bath and shower offering multifunctionality can add value to mature category
Bath additives offers further development potential through personalisation
Bath and shower players to focus on recycling efforts to address environmental concerns

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Colour Cosmetics in Japan

KEY DATA FINDINGS

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Rebound for colour cosmetics as consumers spend greater time outside of the home
Greater preference for brighter colours of eye make-up to match other trends
Demand for durable cosmetics due to wearing of face masks in 2022

PROSPECTS AND OPPORTUNITIES

Despite removal of face masks in early 2023, colour cosmetics is set to struggle to fully recover in short term
Personalisation driven by technology set to gain greater traction within colour cosmetics
Natural facial make-up concept to gain in popularity as use of face masks declines

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Deodorants in Japan

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Improving demand for convenient deodorant formats due to greater time spent on the go
Consumers increasingly demand effective but safe deodorants
Fragrance increasingly features in new deodorant launches

**PROSPECTS AND OPPORTUNITIES**
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**Depilatories in Japan**

**KEY DATA FINDINGS**

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Volume decline slows in 2022 due to greater time outside of the home and increasing inflation reducing expensive salon visits
New launches to address demand for hair removal for intimate areas
Players look to expand beyond traditional categories

**PROSPECTS AND OPPORTUNITIES**
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Brand education from younger age can help foster loyalty among future consumers

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**Fragrances in Japan**

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Emerging concepts and stores as local consumers search for novelty
Salon de Parfum event proves successful for department store Isetan Mitsukoshi

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Hair Care in Japan

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Increasing focus on hair and scalp health in 2022
Hair care brands further develop colour support and products with specific value

PROSPECTS AND OPPORTUNITIES
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Brands increasingly target Generation Z in Japan

PROSPECTS AND OPPORTUNITIES
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Oral Care in Japan

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Younger generations look to affordable whitening products driven by focus on self-image
Increasing health consciousness drives demand for more sophisticated toothbrushes

PROSPECTS AND OPPORTUNITIES

Players to encourage more enhanced oral care routines to support overall health
Mouthwashes/dental rinses offers further growth and development potential
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Skin Care in Japan

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2022 DEVELOPMENTS

Greater focus on skin sensitivity and cleansing properties
Greater education among local consumers encourages brands to explore ingredients with specific claims
Convenience stores aim to intensify competition in mass segment of skin care

PROSPECTS AND OPPORTUNITIES

Facial care to continue driving skin care, while brands of body care must further invest in marketing to expand consumer reach
Despite wealth of ingredients, skin care continues to push boundaries
Personalised skin care using technology set to gain momentum over forecast period
KEY DATA FINDINGS

2022 DEVELOPMENTS
Sun protection benefits from greater mobility and rising awareness of potential harm of exposure to UV rays
Elements of colour cosmetics emerge in sun care
Skin care elements increasingly considered as part of sun protection

PROSPECTS AND OPPORTUNITIES
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Premium Beauty and Personal Care in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS
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Easing of restrictions attracts both domestic consumer and inbound arrivals, benefiting premium segment
Department stores review services to push sales of premium products

PROSPECTS AND OPPORTUNITIES
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2022 DEVELOPMENTS

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Further development of private label in the mass segment
Rising cost of living encourages consumers to search for affordable but effective products

PROSPECTS AND OPPORTUNITIES

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Thailand set to become next major trend for colour cosmetics in Japan

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