

THE COSMETIC INDUSTRY IN JAPAN

NO.2 : 1970

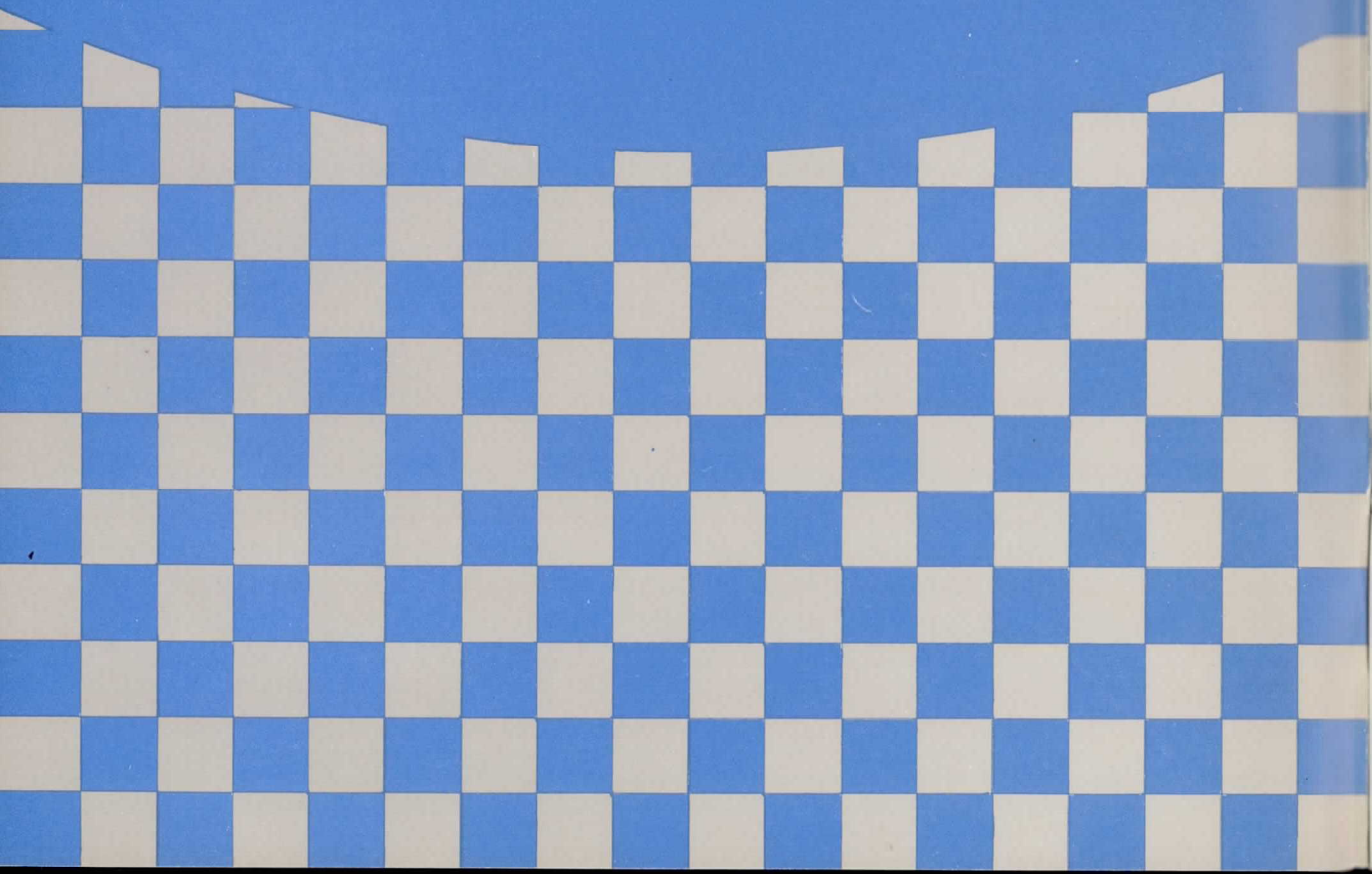


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Greeting



Kozaburo Kobayashi



Masahiro Sakamoto

July 1970

EXPO '70 which symbolizes the progress and harmony of mankind has been held in Osaka since March 15 this year. So many countries from all over the world have participated in it that it has turned out to be a wonderful festival which helps greatly to build up a closer friendship among the nations.

On this occasion a number of foreign people have been visiting Japan. Japan may appear to foreign people quite an interesting country of the Far East. She has a history of about 2000 years and has preserved a culture of her own throughout these years. On the other hand, she started to establish active contact with the world about a hundred years ago and has since been assimilating the thought and science of Europe and America to advance the progress of industry, economy, culture and so on.

The Japanese cosmetic industry is no exception to the rapid progress which all Japanese industries have marked. The purpose of this booklet is to help you learn how the Japanese cosmetic industry has grown up to be as it is today. It will be a great pleasure for us if it helps you acquire a sufficient knowledge of the Japanese cosmetic products.

It has always been our ardent desire to cultivate friendship with all the people of the world through our business.

Japan Cosmetic Industry Association

Kozaburo Kobayashi

Representative Director

Masahiro Sakamoto

Representative Director

Developing Japanese Cosmetic Industry

The Japanese cosmetic industry has been developing remarkably, backed and accelerated by the high growth of the Japanese economy at large.

The Japanese economy has not ceased to record a substantial 10% growth every year since 1960, showing a pronounced increase in her exports and foreign currency reserves. Encouraged by an active demand both at home and abroad, the Japanese industries are keen on the expansion of production facilities and the Government is making efforts to replenish the public investments such as construction of roads and ports, housing, etc. This has resulted in a brisk demand for labor, which now shows a decided increase over the supply, especially of young labor.

Under this favorable situation, the wage base has been raised every year with the result that the number of persons with small incomes decreased, while the middle class increased accordingly.

In prewar times economy and savings were a guiding principle in the lives of the Japanese people and, as a matter of fact, economy and savings were regarded as a virtue. At present, however, the Japanese people put their whole energy into their work and as efficiently as possible at that, but during their spare time they enjoy their individual lives, and yet the living standard has been getting higher every year.

Most young women have a job and an increased number of middle aged women have started to go to work.

Under this situation, the demand for cosmetics has shown a steady increase every year. As shown below, the amounts of cosmetics shipments have quadrupled during the past ten years, a 10 to 20% yearly growth.

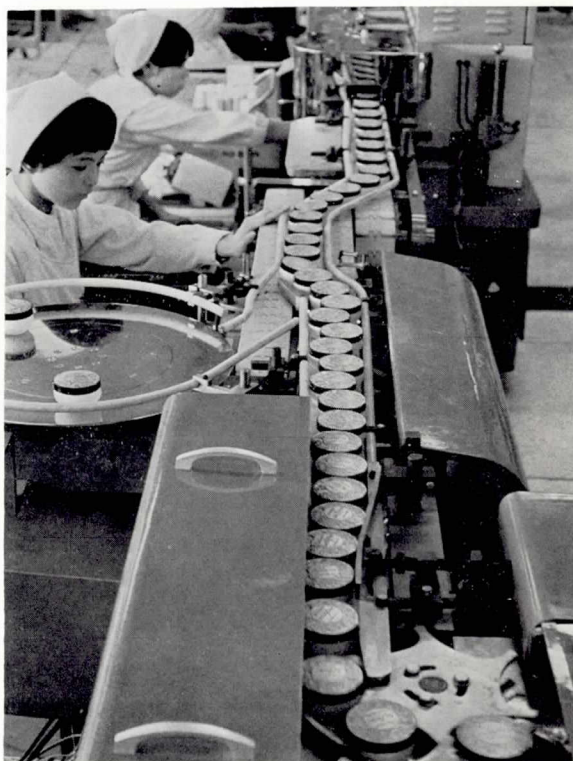
The improvement of the living standard as a result of an increase in the national income, larger incomes as a result of the appearance of working women, improved positions of women in society and their social activities, all have combined to promote the sales of cosmetics.

Sales Amount of Cosmetics

(Yen in thousands:
Manufacturers' price)

Year	Amount	Increase over Previous Year
1960	47,862,468	14.0%
1961	53,265,787	11.3
1962	65,937,975	23.8
1963	83,623,447	26.8
1964	97,761,323	16.9
1965	108,745,416	11.2
1966	121,312,809	11.6
1967	133,689,425	10.2
1968	152,143,346	13.8
1969	184,533,335	21.3

Part of a cosmetic factory



Research and Development of Cosmetics and Efforts to Increase the Demand

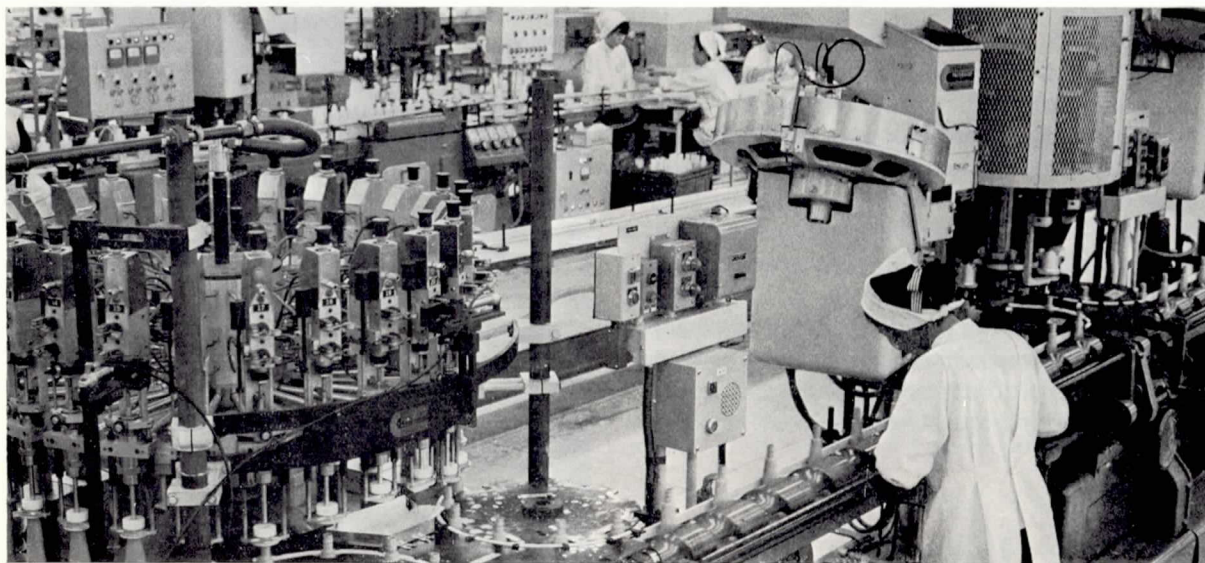
The Japanese cosmetics manufacturers have always made efforts to improve the quality of products and develop new high-quality products to meet satisfactorily the requirements of users at home and abroad. Each and every manufacturer is expanding its experiment and research facilities and has a number of technical experts rich in knowledge and experience to devote themselves to research. A certain large manufacturer, for instance, has a fundamental research center and a products research center, where 210 scientists, all told, are divided into groups to conduct technical surveys, research and experiments in respective special fields. Needless to mention, all others have also recognized the importance of research facilities to the fullest extent and have been concentrating their efforts on their expansion. Dermatology and biochemistry are far advanced in Japan. Scholars of great authority are assiduously carrying on research in the role of a leadership at colleges and universities. The technical ex-

perts of cosmetics manufacturers, keeping close contact with those scholars and institutes, are at great pains to work out cosmetic products which can be of a help to the physiological action of skin and hair to make them healthier and more beautiful. Sufficient care is taken for the safety of products to the users.

Users strongly demand, these days, products which agree with their constitution and taste. Consequently manufacturers of cosmetic products take into consideration the age, sex, skin condition, taste and the like, of users and put on sale various new products which may serve their respective purposes to satisfy the users and develop further the demand for cosmetic products. Men's cosmetics, children's cosmetics and various skin care products are developed according to the different types of skins, etc.

A couple of years ago major cosmetics manufacturers started to advertise men's cosmetics extensively. Since a long time ago, men's hair preparations have been sold in large quantities in Japan. The men's cosmetics for skin care are quite new products for which some demand has been developed gradually and the sales still remain at low levels. And yet they promise a bright future.

Bottling skin lotion



The development of airplanes has rendered an interchange of people more frequent all over the world; European and American fashions are easily and immediately introduced into Japan. The way of life of Japanese people is being westernized. Young people's interest in fashions is getting keener and keener. In spring and autumn influential cosmetics manufacturers prepare their original make-up patterns matching the up-to-date seasonal fashions and conduct a vigorous campaign for a new demand.

Japan is a country where four seasons alternate regularly. The Japanese cosmetics manufacturers, emphasizing the importance of skin and hair care according to the season and seasonally-adjusted make-up, are carrying on an intensive advertising campaign to draw the consumers' interest.

Recently the demand for sun-tan cosmetics and sun-screen cosmetics, as necessities, for the summer season has been growing rapidly. An anecdote is told of how the boom started in these articles; four or five years ago a certain cosmetics manufacturer distributed advertising placards in which a beautiful woman was shown standing at the seaside. The placard made such an sensation among young people that placards displayed in front of retail stores were stolen away at many places across the country. This in turn made another sensation, rapidly exciting interest in consumers and boosting the sales.

In parallel with the improvement of living standard, the demand for quality cosmetic products has been getting stronger. There are now on sale many de luxe brands reflecting elegant taste. On the other hand, several manufacturers are marketing ¥100 cosmetics, cosmetics worth about 30 cents a piece. There are several classes of cosmetics in between in terms of price. There is a tendency that cosmetics are diversified with respect to prices as well. It may summarily be said, however, that sales center on the middle-class products and a demand is gradually increasing for quality products.

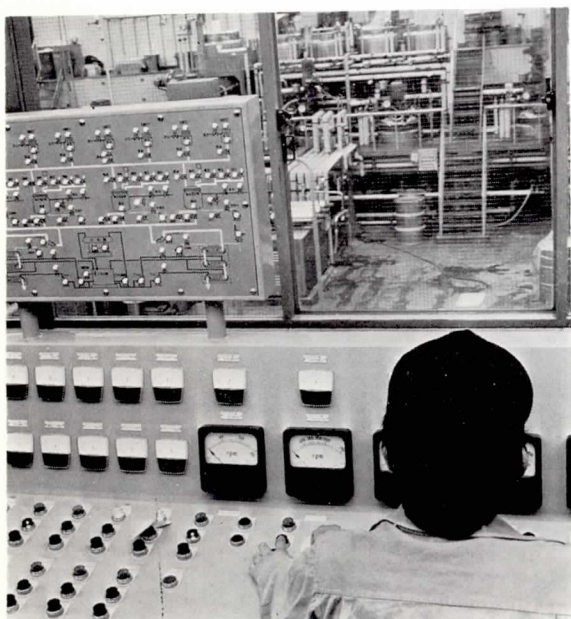
Sales by Products

The 1969 Japanese cosmetics sales are classified by products and shown in the following table.

Cosmetics sales in 1969 (Yen in thousands)	
Item	Amount
Face cream	27,539,006
Liquid cream	11,082,065
Make-up base	11,071,803
Skin lotion	17,956,984
Hair pomade, Hair conditioner	12,242,280
Hair tonic	3,753,302
Hair spray	6,018,974
Shampoo	13,122,122
Hair dye	6,538,978
Compact fact powder	14,335,731
Other face powder	1,480,705
Lipstick and Rouge	9,457,002
Eyebrow and Eyelash products	3,793,467
Eye make-up	5,898,851
Manicure	3,028,775
Perfume and Cologne	5,989,915
Men's toiletries	2,895,861
Medicated cosmetics	11,997,177
Others	16,330,334
Total	184,533,335

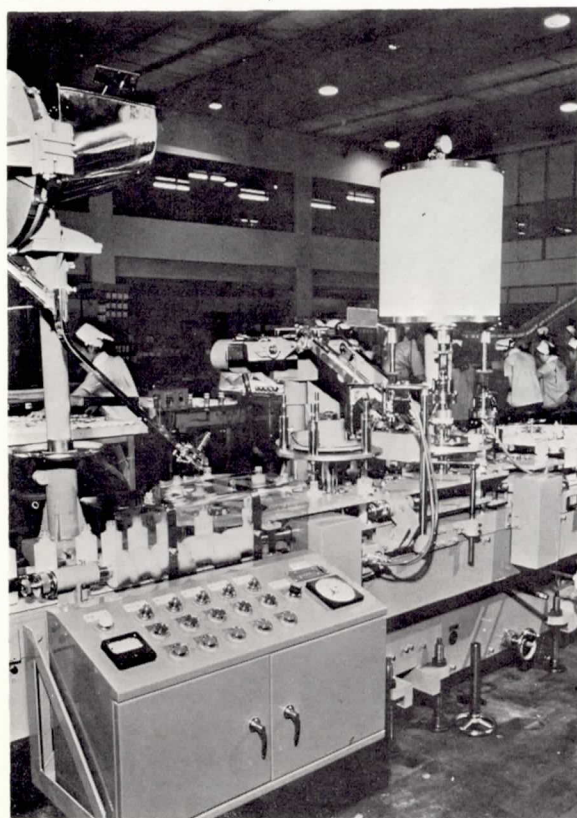
In Japan, skin care products amount to 37% of the total Japanese cosmetic preparations. The high consumption rate of skin care products is characteristic of the Japanese cosmetic industry.

It is one of the time-honored Japanese traditions that women adore natural skin by keeping it healthy and beautiful-looking. In addition, Japanese women are quite smooth-and delicate-skinned by nature. To help their skin remain



A remote control system at a cosmetic factory

Part of a cosmetic factory



more beautiful, the cosmetics manufacturers have made intensive research on face creams, moisturizing lotion, and skin lotions in particular.

The quality of skin care preparations can justly be said to be determined by the emulsification technology. Although the manufacturing principle is clearly understood, quality products come out only through a combination of tradition-fostered delicate feelings and far-advanced scientific knowledge. The cosmetic products are so delicate that only an elaborate combination of material compounds can give people an exquisite and unique pleasure for these products. The Japanese manufacturers are confident that they are leading in the development of emulsification technology all over the world. It appears, beyond that, that no other country has such an abundance of skin care preparations.

Recently there is a marked tendency that make-up preparations are increasing in a sharp curve. This tendency, as mentioned above, is attributed to the fact that demand has been developed expansively by make-up campaigns in close connection with dress fashions. In 1969 leading manufacturers launched an advertising campaign simultaneously making a feature of the make-up preparations for the eye. As a result, the eye make-up preparations astonishingly jumped 128.1% over the previous year and the eyebrow and eyelash preparations showed 71% sales increase.

Manicure preparations are one of the cosmetic products which have been delayed in propagation in Japan. Recently, however, most young women use manicure preparations to take care of their fingernails. In 1969 the manicure preparations increased by 90.2% over the previous year.

Pressed powder are one of the cosmetic products of the highest growth rate. For the past ten years the sales grew twelve times larger.

Fragrance is the product, in least demand in Japan. The Japanese are a nation who have



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always had deep adoration for fragrance from the remotest times. There is an evident proof on record in which ancient people of high society regarded it common civility to burn incense and enjoy the smell or fill their clothes with the smell. It appears, however, that since World War II, the Japanese people have forgotten the practice of daily use of perfumes and eau de Cologne. For the past couple of years, however, there have been indications that the demand would pick up. A vigorous sales campaign would presumably increase the demand.

The men's cosmetics have not increased in parallel with the efforts of the manufacturers. Men apparently pay attention chiefly to hair-care in Japan. It can be said so on trustworthy evidence that the hair-care preparations for male use represent approximately 60% of the total hair preparations sold. With the medical

hair tonics included, the cosmetic preparations for male use will occupy a 12% to 13% share of the whole sales of cosmetic preparations.

The medicated cosmetic preparations are permitted to have some medicinal efficacy but they are sold as quasi drugs according to the Japanese Pharmaceutical Law. The cosmetic preparations are not permitted to be claimed as medicinal preparations in public. But on the other hand, quasi drugs which have same medical efficacy to a certain extent are permitted to be sold freely at any retail stores other than pharmacist's offices and drug-stores. For this reason there has recently been a marked increase both in production and shipment of the medicated cosmetics. They consist mainly of medical creams, medical lotions, medical hair tonics, hair dyes, depilatory creams, para-suntan creams, baby powder, etc.

Part of a cosmetic factory



Consumption of Cosmetic Preparations in Urban and Rural Areas

The Metropolis of Tokyo with an enormous population of more than eleven millions has now grown into the largest city in the world. The 15th Olympic Games were held in Tokyo in 1964, when Super-highways were constructed in the metropolitan areas for the first time. Thereafter, the highways were extended and new ones were constructed in and out of the metropolitan areas. The construction of highways is further being continued on a larger scale and yet they can not be a solutions to the traffic congestion. To help ease the chronic traffic congestion, the subways are now being further extended in all directions. Skyscrapers are being built one after another. The city is full of life.

The area over a radius of 100 km with Tokyo at its center is now developed as a housing district into which population is moving rapidly.

The second largest city of Japan, Osaka,

opened Expo'70 on March 15, 1970. With this as a momentum, Osaka underwent a complete change; highways and subway were extended and new ones were constructed. New hotels and skyscrapers appeared.

Besides Tokyo and Osaka, other big cities have been adding to their population such as Nagoya, Yokohama, Kyoto, Fukuoka and so on. The centralization of population in big cities is a marked tendency. The tendency also has a favorable effect on the cosmetics demand.

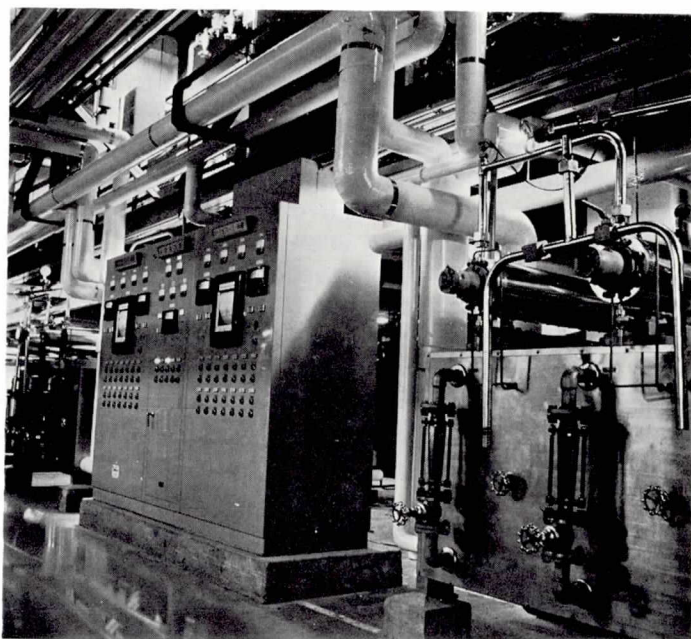
On the other hand, in agricultural areas, the development of farming machines and equipments, fertilizers, agricultural medicines and insecticides has brought about a bumper crop every year. The protective policy of the Government helped stabilize the agricultural prices. Consequently the agricultural incomes have increased in all sectors, raising the farmers' living standard in a sharp curve. The cosmetics consumption in rural areas has also been at remarkably higher levels.

The amount of cosmetics consumption per household for the past ten years in the urban and rural areas is as follows:

Year	Yearly Cosmetics Expenses per Household in Cities	Ratio of Cosmetics Expenses to Whole Household Expenses	Yearly Cosmetics Expenses per Household in Rural Areas	Ratio of Cosmetics Expenses to Whole Household Expenses
1959	1544 Yen	0.45%	962 Yen	0.28%
1960	1898	0.51	988	0.27
1961	2134	0.52	1281	0.31
1962	2541	0.55	1662	0.36
1963	2824	0.54	1989	0.39
1964	3498	0.61	2277	0.39
1965	3923	0.63	2989	0.46
1966	4463	0.66	3338	0.46
1967	4786	0.65	3649	0.43
1968	5349	0.67		

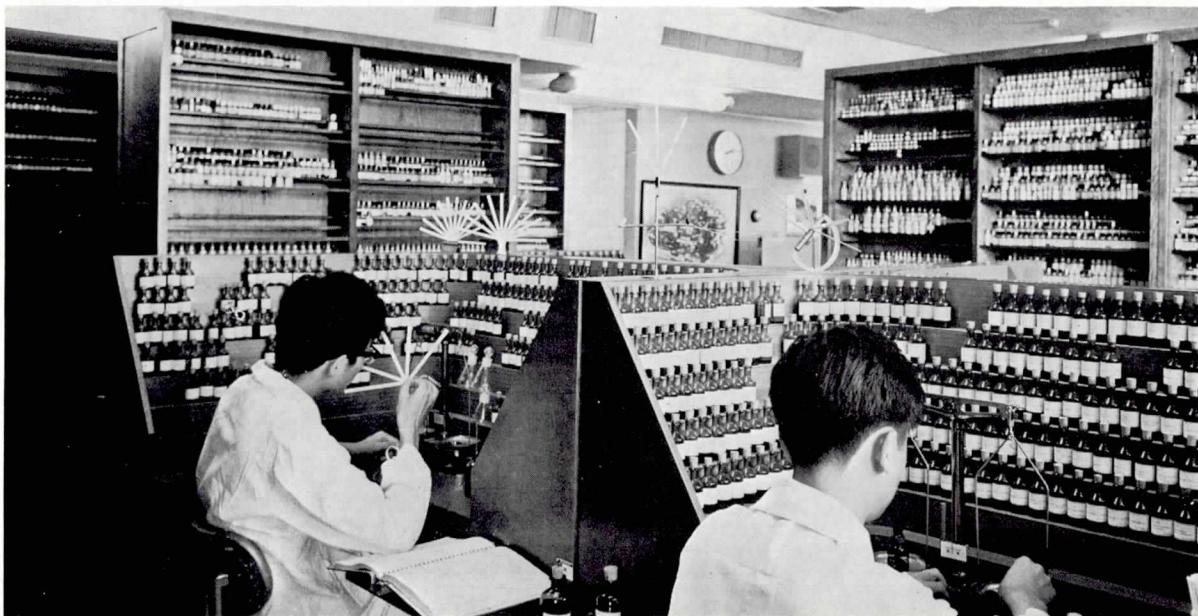
An increase in the amounts of cosmetics consumption is conspicuous both in urban and rural areas. The percentage of cosmetics expenses, in the total household expenditure has a tendency to grow every year.

The amount of per capita spending on cosmetics is estimated about a one-third of that of the American people and about a half of that of the English, French and German peoples.



Part of a cosmetic factory

Research of perfume compounds



Safety of Cosmetic Preparations

Since the cosmetic preparations are applied directly to the human skin and hair, they must be produced in completely sanitary condition and must contain no particles of dangerous compound.

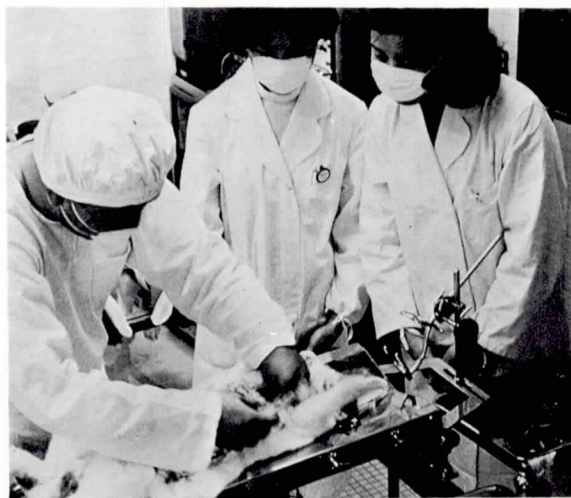
The Japanese Government holds cosmetic products under rigid control by the Japanese Pharmaceutical Law, as is the case with medical supplies.

Any-one who wishes to produce cosmetics must apply for permission to the Welfare Ministry. The ministry makes sure whether the applicant has a clean and sanitary factory, necessary experiment facilities and superintendent technical experts before it gives permission. When new products are to be produced and sold, the compounds of each and every product must be described in an application form and it must be sent in to the ministry for the approval of each product. The products are never permitted to be put on sale unless the application is approved. When new materials are to be used in those new products, data evidencing as to their innocuousness must be attached to the application. As it takes a long time to obtain permission for each product, it is usually quite difficult to set the time for the announcement and advertisement of new products. This is, however, a requisite procedure to follow for the protection of the users. Imports must also be given permission by the same authorities in the same way before they can sell here.

In 1968 the Welfare Ministry set the standard for 114 kinds of cosmetic materials and made them public, and in 1970 new materials were added. Before 1968, independently of the ministry, The Japan Cosmetic Industry Association had set their own standards for raw materials to be used, and it had been agreed upon among the cosmetics manufacturers that materials above the levels of those standards would be used. The Government carried out studies on the basis of the manufacturers standards and set their own accordingly in 1968.

The Government specifies the tar pigments which may be used in cosmetic products and sets a limit to the quantity of special compounds to be blended in cosmetic products such as hormones, antiseptics, mold-preventives, etc. Mercury compounds are prohibited from being mixed or blended in cosmetic products.

These days a strong public outcry has been raised for the protection of consumers. The cosmetics' manufacturers have always paid sufficient attention to the safety of products and yet will make further efforts to keep up the safety levels of their products. They will take care not to use doubtful materials, even if they are approved by the Government.



Conducting a virulence experiment on an animal

Research of cosmetics by the use of microscope



Japan Cosmetic Industry Association

Japan Cosmetic Industry Association was formed as an organization for the cosmetics manufacturers of Japan with 320 members all told. Approximately 150 of them are located in the Metropolis of Tokyo and its vicinity. About 150 are located in the Osaka and Kobe areas with the rest of them centered around Nagoya city. The association makes it its aim to contribute to the welfare of the nation through promoting friendly relations and mutual interests among the members and developing the cosmetic industry.

The main activities of the association are :

1. To collect impartial opinions of the industry and report them in a rearranged form to the Government and its related agencies, if necessary.
2. To coordinate the communication and promote the friendly relations among the members.
3. To collect and compile data for the statistics on cosmetics and conduct market research which can be of a help to the members.
4. To make researches and surveys to help improve the quality of cosmetic products.
5. To set quality standards for materials.
6. To propagate correct knowledge of cosmetics.
7. To keep in contact with foreign cosmetics manufacturers organizations and maintain friendly relations with them.

The head office is located in Tokyo with a branch office set up respectively in Osaka and Nagoya.

Exports and Imports of Cosmetic Preparations

The exports of cosmetic preparations have increased from year to year. The exports for the past ten years since 1960 are as follows ;

Year	Exports (Yen in thousands)
1960	1,129,873
1961	1,227,019
1962	1,181,475
1963	1,590,895
1964	1,812,807
1965	1,946,173
1966	2,436,446
1967	2,695,478
1968	3,206,841
1969	3,862,031

The exports grew approximately three and a half times larger in yen amounts. The principal destinations and amounts of exports of 1969 are shown in Page 15.



Beauty girls from South East Asian countries studying make up at the Seminar in Japan

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Cosmetics Exports and Destinations 1969

			(Yen in thousands)		
Destination	Amount	Increase; △Decrease Rate	Destination	Amount	Increase; △Decrease Rate
Ryukyu Island	1,355,428	30.9	Republic of Viet-Nam	29,573	△30.5
Hongkong	707,477	15.6	Trucial Oman and Katal	25,294	△ 6.6
Thailand	406,224	20.2	France	16,130	3.6
U.S.A.	277,948	35.8	Mariana Marshall Island and Caroline Island	16,045	△ 0.7
Singapore	243,222	13.2	Finland	15,881	22.8
Malaya	122,922	66.0	Barren Islands	13,219	0.8
Philippines	62,679	6.8	Saba	12,458	11.0
Italy	62,658	66.0	Others	161,458	△ 1.7
Kuwait	55,479	19.2			
Republic of Korea	41,978	56.4			
Nederlands	37,512	380.7			
Indonesea	36,551	327.7			
Lebanon	33,117	△24.7			
			Total	3,733,361	20.2

Southeast Asian countries were the principal destinations. Recently, however, some quantities have been exported to the U.S.A., Italy and the Netherlands, exports to those Western countries are expected to be increased.

Some of the Asian countries have laid a ban on all cosmetic imports. Japanese manufacturers are therefore producing cosmetic products in those countries in technical collaboration with native firms. And there are many Japanese cosmetics manufacturers who have set up joint-ventures in Republic of Korea, Republic of China, Singapore, Thailand, the Philippines, Brazil and Peru as well. Apart from exports of finished products, instances of such overseas expansion will be much larger in number from now on.

Imports have also increased. The total imports for 1969 were 1,835,939 thousand yen.

When broken down in percentage by origins, they stand at 52% for the U.S.A., 24% for France, 10% for West Germany and 10% for Australia. The imports from France were mostly perfumes and eau de Cologne.

The number, is not large yet, of subsidiaries of foreign firms which are producing cosmetic products in Japan, such foreign subsidiaries merged into Japanese manufacturers or such subsidiaries which are producing cosmetic products in technical collaboration with Japanese manufacturers. Their share of the market is neither large. Foreign-Japanese joint businesses must obtain permission from the Japanese Government and at present no permission is given to the establishment of new 100% foreign-capital owned subsidiaries.

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To all the peoples of the world

As described above, the Japanese cosmetic industry has been making remarkable progress. Exhaustive research have been carried on products which have always been invested with the important aim of making the users more beautiful and attractive and to keep their skin and hair healthier. It is our great pleasure to learn that Japanese quality products are getting gradually universal acceptance abroad. It is a fact, however, that most people abroad do not have yet an idea what Japanese cosmetics products are.

We are looking forward to a time when people of the world use more Japanese cosmetic pro-

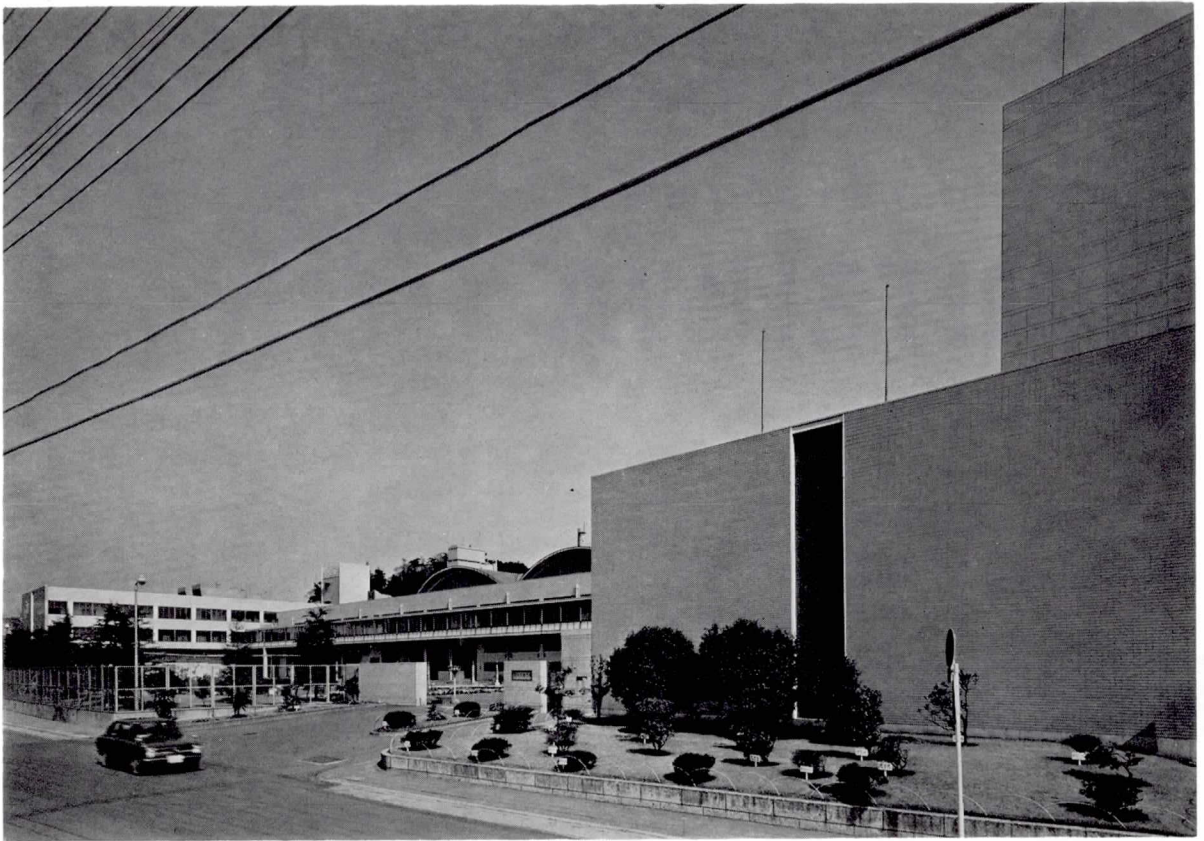
ducts, recognize their valuable quality and, last but not least, become more beautiful and attractive and thus enjoy their lives. We will redouble our efforts in research to attain this goal.

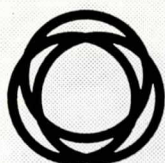
Japanese cosmetics sold at a department store in the U.S.A.



View of typical cosmetic factories







Registered - Trade Mark

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MEDICATED SOAP "MUSE"



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Old-Time Toilet Customs

It is said that the origin of cosmetic dates back no less than 3000 years in Japan. But it is since 538 A.D. that cosmetics were clearly on record. Face powder and rouge in particular were already mentioned in "Kojiki" or the Legendary stories of Old Japan and "Nihon Shoki" or the chronicles of Japan.

Face powder was introduced from China and a basic lead carbonate was used as its material. Besides, flour and berries of a false jalap were also used as material for powder. Vegetable pigments expressed of safflowers were used as rouge material for the cheeks and lips. Then followed eyebrow paints, hair oil, hair washing powder and skin washing powder. Sometime later, cosmetic lotions and teeth whitening substances came into being.

At the beginning, the cosmetics were the monopoly of the noble and the high class.

As time went on, however, they began to be used by common people as well. Since the Edo period, that is since 1603, they spread widely among the common people. Many masterpieces of Ukiyoe depicted a woman in make-up. This may prove that during the Edo period, cosmetics were regarded as necessities in the daily lives of the people of this era.

Among the mirror stands and cosmetic sets used at the Edo period, there are many important articles in which the cream of the industrial art of this period is displayed. Many articles are designated as important art works by the Government.

It is our pleasure if the following pictures can help you imagine Japanese women of 300 years ago in make up, and have an idea what some of the Japanese cosmetic articles of those times were.



"Kagamino Maeno Zu"

(Woman in front of a mirror)

Sukenobu Nishikawa (1671-1751)

An old Japanese saying goes, the white skin makes up for seven short points of a woman. In other words, homeliness does not matter so much if a woman has a fair skin. A fair skin was a prerequisite to the beauty of the old times. In those times, therefore, women used to apply ample powder not only on the face but on the neck, chest and back.

As seen in this picture, a woman bare to the waist with one knee raised before a mirror would appear slovenly to the people of today. This used to be, however, nothing but the common make-up customs at this period (18th and 19th centuries) in Japan.

This young beautiful or rather cute woman, perhaps just after the bath, does not give a slightest impression of slovenliness. One of Sukenobu's masterpieces.

At this period, a mirror stand was not used. Instead, the copper mirror was hung on a string at the back and a box or a case for cosmetic articles was used separately. (The possession of Atami Museum)

Ukiyo Shiju-Hakkuse (48 habits)

Eisen Keisai (1790–1848)

"To be particular about one's hair is a characteristic habit of women." As the explanation goes, women use the utmost care when they check their hair make-up with counter-mirrors (a set of two handy mirrors which are set against each other to see one's appearance from the back). But this is one of the moments when women give men great feminine attraction. The jetblack-lacquered mirror-stand, of box type, has a folding mirror holder. The drawer which comes out in a vertical direction can hold cosmetics and accessories.

The white paper pack with an inscription "Senjoko" or a fairy perfume in front of the knees of the woman contains a famous powder which came into being at the beginning of the nineteenth century. In front of the pack, there is a box for hairpins and combs.

Because of the hair dressing and Kimonos, Japanese women have taken particular care of their appearance from the back, especially the appearance of the back of the hair and the border of the back hair. (The possession of Watanabe Wood Print Store)



Antique Cosmetics Articles

Gorgeous cosmetic box with a beautiful arabesque gold-lacquered design. Judging from the insignia of Kuyo Hosokawa, the box was owned by the Hosokawa family, a Daimyo or a feudal lord of the Edo period.

The drawer comes out toward you, unlike the one in the previous picture.

From left to right: mirror with a holder, round mirror, comb box, incense case and two porcelain rouge containers.

Top: porcelain oil jar with a narrow neck (container for hair oil) and three combs.

Bottom: ivory articles for eyebrow dressing, comb brush and powder brushes (two large- and medium-sized ones).

Top: hair lotion container. (The possession of Mr.N.Sakamoto of Fine Cosmetics Co.)



Containers of Lip Rouge

In old times Japanese women did not have lipsticks as are in use nowadays, but used instead, a sort of natural rouge extracted from safflowers. As a commercial product, the rouge was spread on the containers (shown in the pictures), when sold.

The two containers (top right) are porcelain wares; the one with some rouge left is called "Benichoko" or a rouge cup and the larger one which has no more rouge is called "Benichawan" or a rouge bowl. When the

rouge was used up, the bowl served as a gargling bowl for washing the mouth after the dyeing of teeth.

All others are made of ivory. The handsome gold lacquered, thin box was called "Beni ita" or a rouge board.

When women wanted to put rouge on their lips, they moistened the tip of a rouge brush or their third finger to take rouge off the containers. This is why the third finger was given another name, rouge-putting finger. (The

possession of Mr.K.Sawada of Kiss Me Cosmetics Co.)



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SUNSTAR DENTIFRICE CO., LTD.

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The Activities of Japanese Dentifrice Manufacturers and Japan



Atsushi Kobayashi
Representative Director of
Japan Dentifrice Manufacturer's Ass'n.



Hiroo Kaneda
Representative Director of
Japan Dentifrice Manufacturer's Ass'n.

In 1969 the amount of dentifrice shipments totaled 28,284,451,000 yen in Japan. The whole quantity was produced by ten Japanese dentifrice manufacturers. These ten manufacturers have organized East Japan Dentifrice Manufacturers' Association in Tokyo and West Japan Dentifrice Manufacturers' Association in Osaka, and have also formed Japan Dentifrice Manufacturers' Association as a higher organization than the two associations with an aim to contribute to the sound growth of the national economy through the development of the dentifrice industry and promotion of their mutual friendly relations. Japan Dentifrice Manufacturers' Association has subordinate committees such as Coordination Committee, Technical Committee and Public Relations Committee. These committees have been conducting researches in their respective fields and have been making a representation of the results of researches and subsequent discussions either with permission from the Board of Directors, an executive organ of Japan Dentifrice Manufacturers' Association, or independently of it both in and outside the industry.

For instance, the "joint dentifrice campaign" inaugurated in 1963, which is also called "teeth hygiene week", has been conducted extensively across the nation for a week beginning on June 4 every year. In this campaign the Public Relations Committee takes the initiative to prepare posters for advertisement and unroll across the country variegated functions such as various gatherings for teeth hygiene, meetings of teeth and beauty, etc. The theme for the 1969 joint campaign was "Let's brush our teeth right after meals." No less than two hundred thousands color-posters for the campaign were distributed to and put up at nationwide primary schools, junior high-schools, dentists, agricultural cooperative associations, etc.

The joint campaign, which brings together the manufacturers in competition for the same purpose and action and contributes greatly to the health and welfare of the Japanese people, is very significant. Beyond that, it helps draw general attention to the existence of the associations.

Production and Shipment of Dentifrice

The shipments of dentifrice of 1969 are shown in the table below.

Dentifrice Shipments of 1969

Item	Quantity (doz.)	Increase/ △ Decrease over the previous year	Net Weight (kg)	Increase/ △ Decrease over the previous year	Amount (Yen in thousands)	Increase/ △ Decrease over the previous year
Tooth Paste	20,498,312	△ 1.7 %	32,818,887	10.9 %	26,041,208	6.6 %
Tooth Powder (moist)	2,552,320	△ 26.7	4,061,108	△ 20.1	2,243,243	△ 18.9
Total	23,050,632	△ 5.3	36,879,995	6.4	28,284,451	4.0

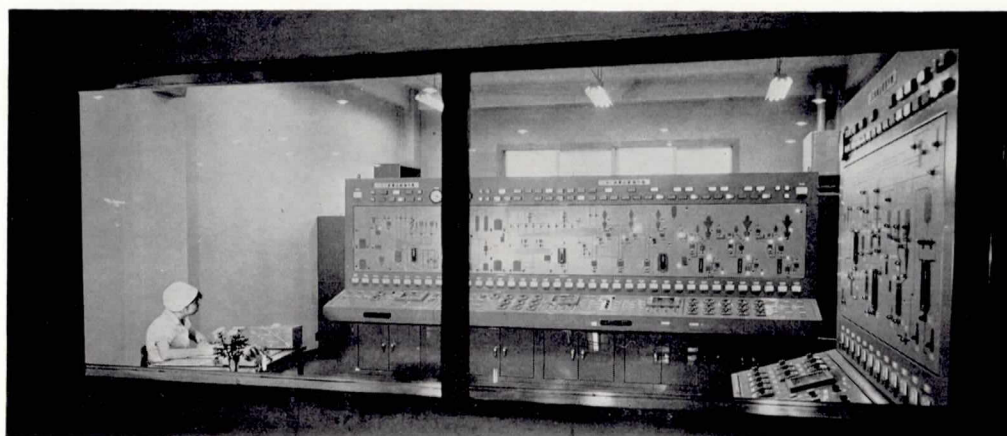
In terms of amounts, the tooth paste occupies 92% and the tooth powder (moist) occupies 8% of the total shipments.

When the shipments of 1969 are compared with the previous year, the tooth paste decreased by 1.7% by the dozen but increased by 10.9% by the net weight and also increased by 6.6% in amount. On the other hand, the tooth powder (moist) showed a great decrease in all respects, say, 26.7% by the dozen, 20.1%

by the net weight and 18.9% in amount. Taken altogether, however, the total shipments only decreased by 5.3% by the dozen with an increase of 6.4% and 4% both respectively in net weight and amount.

The amounts of dentifrice shipments for the past ten years, 1960—1969, are shown in the table below. The shipments almost doubled in quantity and tripled in amount.

A remote control system at a dentifrice factory

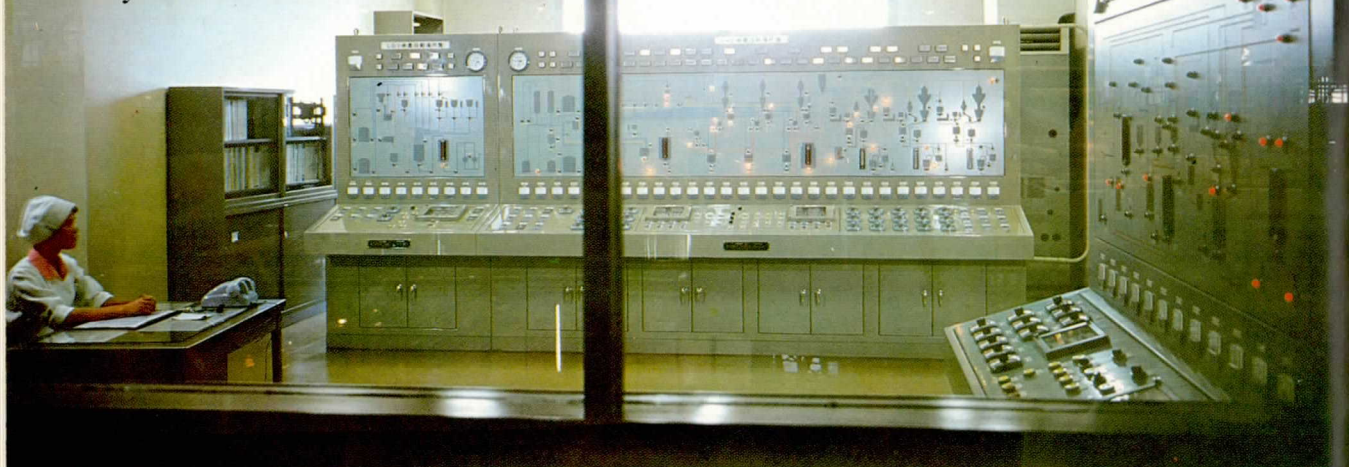


LION CONTRIBUTES TO THE HEALTH AND BEAUTY

Factory at Odawara



Fully automated control box



Production facilities for toothpaste "White & White"



Main products

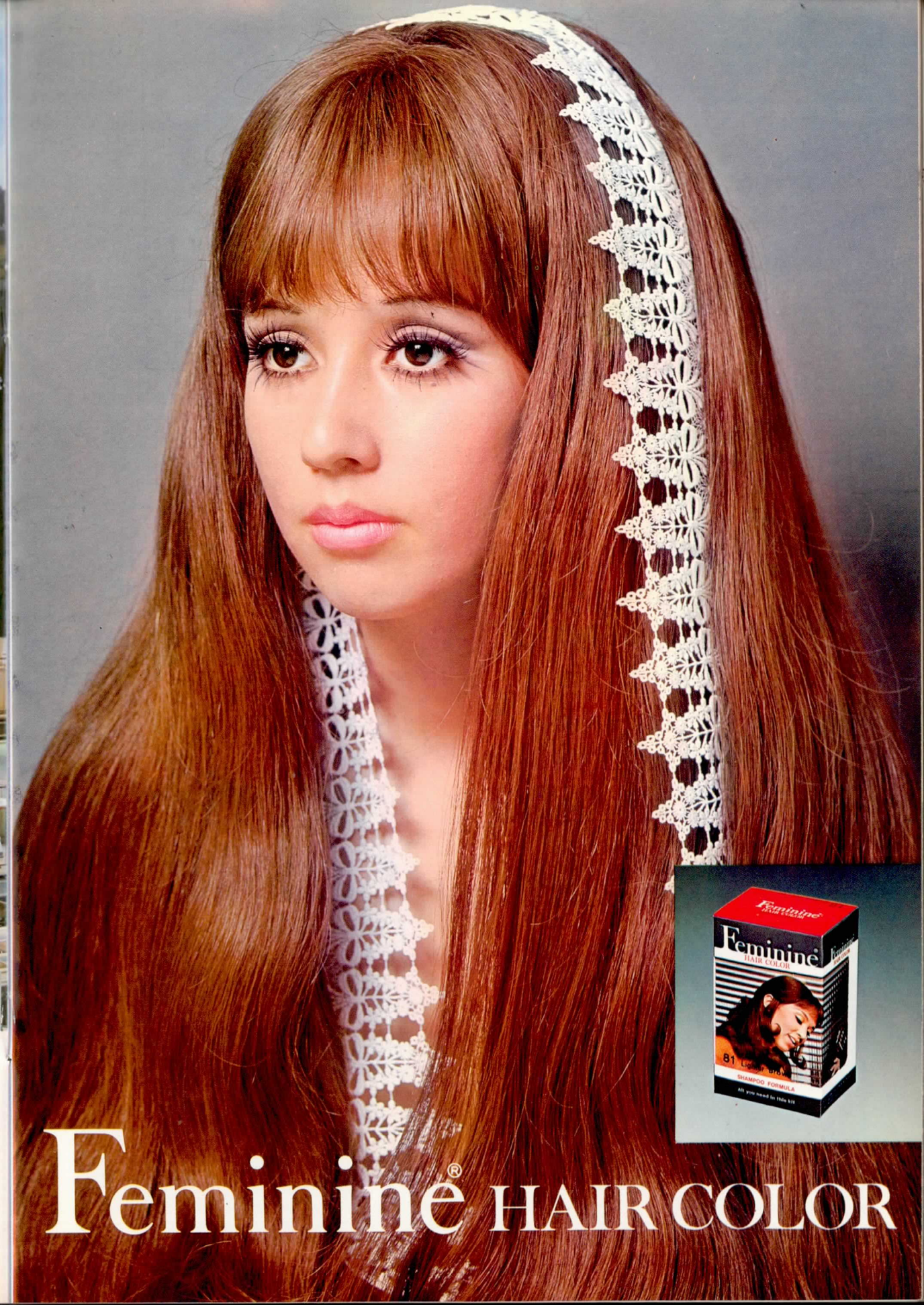
Toothpaste, Toothbrush, Mouthwash, Hair preparation, Deodorant, Shaving products, Household cleansing and cleaning products, Proprietary drugs, Pudding mix, Spices.

THE LION DENTIFRICE CO., LTD.
TOKYO JAPAN

JOINT VENTURE IN
SOUTH EAST ASIA

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- The Lion Dentifrice (Thailand) Co., Ltd. Bangkok

- The Lion Dentifrice (Malaysia) Ltd. Kuala Lumpur
- The Lion Enterprises, Hongkong



Feminine® HAIR COLOR

Table of Dentifrice Shipments

Year	Quantity (kg)	Amount (Yen in thousands)
1959	17,861,908	8,407,236
60	18,300,531	8,967,528
61	19,267,451	10,124,952
62	20,309,274	11,906,958
63	24,111,102	16,582,802
64	27,352,377	18,486,584
65	29,558,834	21,233,903
66	29,891,060	23,912,635
67	34,599,171	27,570,541
68	34,662,793	27,196,578
69	36,879,995	28,284,451

Recent Trend of Dentifrice

The sales expansion of dentifrice has greatly depended upon the fact that in step with the development of marketing techniques and services, new products have been developed and marketed, valuing the consumers' requirements such as whitening and beautifying dentifrice, tooth-decay preventive dentifrice, pyrrhea preventive dentifrice, bad breath preventive dentifrice, etc. Great weight has been added particularly to the medically-effective dentifrice classified as non-medicinal from year to year on the evidence of the statistics of the Welfare Ministry on the shipment amounts of medical dentifrice.

Year	Amount of Shipment (Yen in thousands)	Increase; Decrease over the Previous Year (%)
1967	10,656,789	55.6
1968	14,458,057	35.7
1969 (January-June)	8,120,678	26.9

As clearly shown in the table above, the dentifrice with medical effects has been increasing in a sharp curve since 1967. The 1967's increase ratio to the previous year, 55.6%, is tremendous. The dentifrice of this sort, which occupied 38.3% of the total shipments in 1967, went upward to occupy the greater part of the total shipments of all sorts of dentifrice, as high as 53.2%, in 1968. Beyond that, its ratio to the total shipments further went up and reached 56.1% in 1969 (January—June) and is supposed to grow more in the future.

Dentifrice Exports and Imports

The exports of 1969 are as follows:

Destination	Amount (Yen in thousands)
Ryukyu Islands	84,046
Hongkong	25,402
Others	19,222
Total	128,670

The dentifrice was exported to 12 countries all over the world. Beside the exports, there are a greater number of instances in which Japanese dentifrice manufacturers build factories and produce and sell dentifrice in foreign lands. The amount of products of these overseas operations is estimated around as large as 700,000,000 yen.

On the other hand, the imports are nominal, only 44,364,000 yen, and are mainly from the U.S.A. (28,774,000 yen) and F. R. Germany (14,822,000 yen).

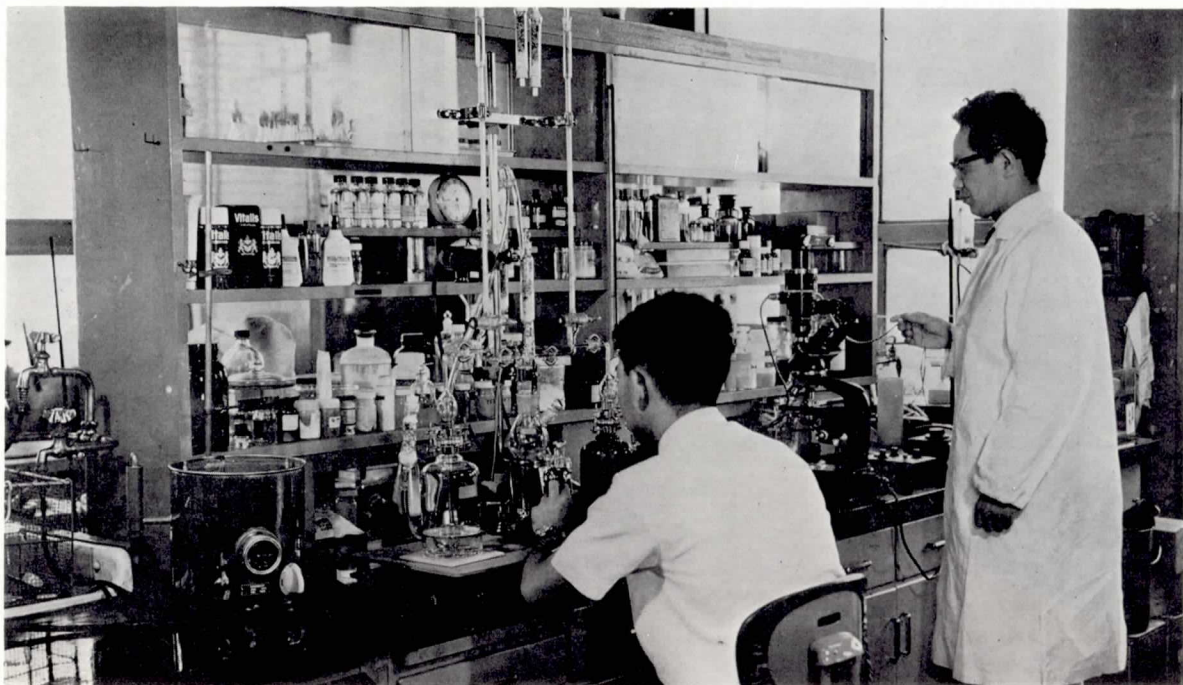
Dentifrice Distribution System and its Problems

The dentifrice distribution system in Japan is a free circulation one. The manufacturers make shipments to drugstores, cosmetic stores, general stores, big stores, etc. via the distributors and second wholesalers. The wholesalers dealing in dentifrice are estimated about 3,000 in number across the country. Since the latter half of 1960's, a cry has been raised for the modernization of distribution systems and, as a result, small-capital wholesalers have been merging together locally or are being merged into large-capital wholesale businesses. This tendency will presumably not die out for quite some in the future and so far, it has not brought

about any confusion or disorder in the existing distribution system. The retailers selling dentifrice consist of 40,000 drugstores, 100,000 cosmetic and general stores, 6,000 big stores and 5—60,000 other kinds of stores, estimated about 200,000 all told across the country. The big stores have been showing a noticeable gain in sales among others.

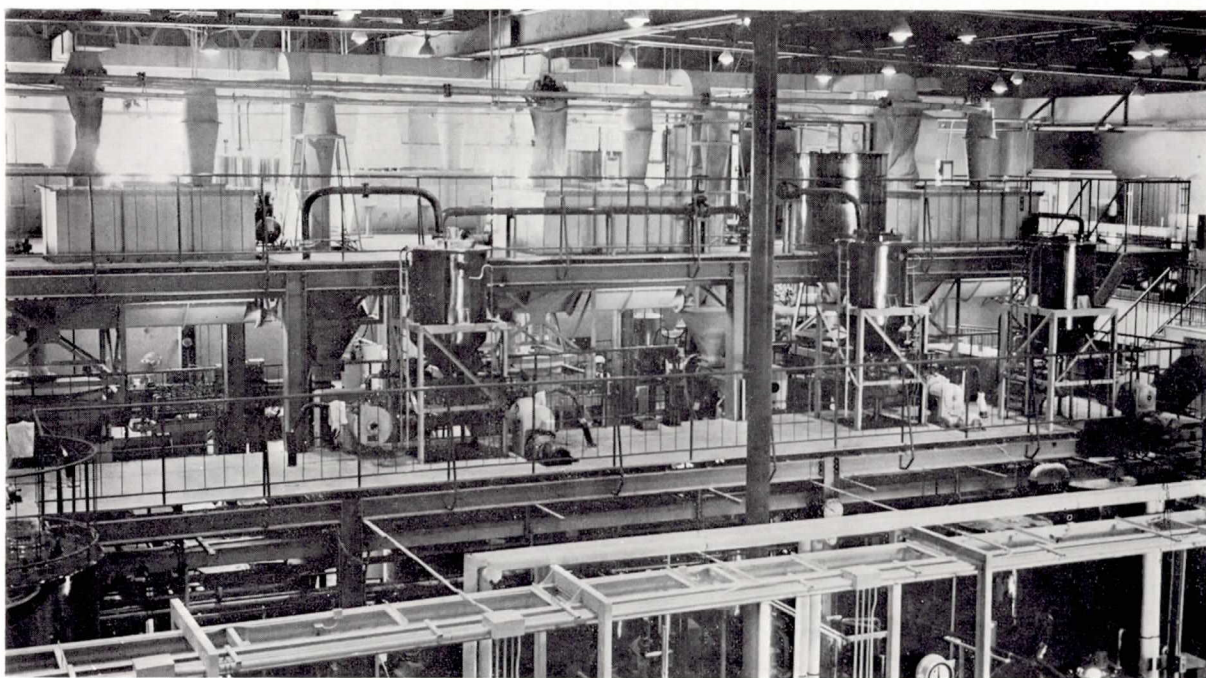
The "retail price maintenance contract" was justified by the law for dentifrice sale and it is a common practice that each and every dentifrice manufacturer concludes a retail price maintenance contract with the wholesalers and retailers before selling their products. This system, contributing to the common interests of consumers, dealers and manufacturers, has attained great results. Under this system, the retailers are permitted to sell dentifrice at a discount of upto 10% but no more than that. The contract system is observed even by most discount stores. The retailers in general, accordingly, do not have to mind the price quoted by their competitors and, as a matter of fact, are engaged in sales with their mind at rest.

Part of a research laboratory of dentifrice manufacturer









Part of a dentifrice factory

Advertisement and Thank-you Sales

The advertising media used for dentifrice sales are television and radio broadcasting, daily newspapers (nation-wide and local daily papers), weeklies, monthlies and outdoor ads. The medium of the most frequent use is television broadcasting. Some manufacturers have a number of ad programs over a wide range of broadcasting time. The influential daily newspapers rank next to television in the order of use. They are often made use of when new products are to be marketed and customer campaigns are inaugurated.

The dentifrice manufacturers respectively carry on a thank-you sales campaign as the occasion may demand; they offer premiums to customers of their own products, raffle off the specified products and carry on a combination sale of a set of dental cream and tooth brush of their own or a discount combination

sale of a set of two dental creams or more. They also invite customers to cinemas and theaters provided customers buy their products.

Future Trend

The Japanese dentifrice is available in six sizes. The recent tendency is definitely for larger sizes. The dentifrice is mostly white but some dentifrice is green or blue. Various kinds of children's dentifrice are now on sale.

As mentioned above, the dentifrice (non-medicinal) developed in segments according to consumers' taste and requirements, has been increasing in a sharp curve. Every dentifrice manufacturer is making strenuous efforts to provide to their customers products of higher quality and more marked characteristics.

There are indications that the tendency will turn towards the dentifrice with a definite purpose of use and variety products.



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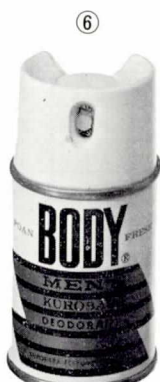
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Tel.: Tokyo (03) 363-8211—6
Main Products: Hair Color, Cold Wave Lotion, Hair Spray, Hair Dressing, Shampoo, Cream Rinse, Oil Bleach, Set Lotion

C'bon Cosmetics Company

Head Office: 11, 10, 4-chome Roppongi, Minato-ku, Tokyo
Tel.: Tokyo (03) 404-7501
Main Products: C'bon Superior; Skin lotion, Freshener, Sepcial milk, Cold cream, Cleansing cream, Beauty cream, Beauty chaste, Beauty fashion, Beauty mask, Beauty pat, Beauty stick, Luminous cake, Beauty Lip stick, Fashion veil
C'bon Maxim; Face lotion, Freshener, Milk lotion, Cleansing cream, Massage cream, Moisture cream

Dahlia Cosmetic Co., Ltd.

Head Office: 25, 3-chome Tendo-cho, Kita-ku, Nagoya 462, Japan
Tel.: Nagoya (052) 981-9561—5
Main Products: Dahlia, Menard and Lui-Cee brand cosmetics

Hollywood Cosmetic Co., Inc.

Head Office: 5-13, 6-chome Roppongi, Minato-ku, Tokyo
Tel.: Tokyo (03) 403-5211
Main Products: Parisienne Cosmetics, Orchid Cosmetics

Izutsu Cosmetic Co., Ltd.

Head Office: 26-1 Aoto 4-chome, Katsushika-ku, Tokyo
Tel.: Tokyo (03) 601-7708
Main Products: Hair tonic, Set Lotion, Hair Spray, Hair Oil, Shaving Foam

Juju Cosmetics Co., Ltd.

Head Office: 12, 2-chome Koenji-Minami, Suginami-ku, Tokyo
Tel.: Tokyo (03) 311-2121
Main Products: Nourishing Creams by Age-Groups; Miss-Juju, Madame-Juju, Enrich Madame-Juju, Juju-Cream, Juju-Cold Cream, Men's Cream Mr. Juju-S, Liquid Cream, Lotion and Make-up Preparations

Kaminomoto Co., Ltd.

Head Office: 2, 3-chome Kumochibashidori, Fukiaku, Kobe
Japan
Tel.: Kobe 23-1455
Main Products: Kaminomoto, Hair Rinse, Shampoo, Hair Set,
Dental Cream, Hair Lotion, Beauty Soap, Medici-
nal Plaster and Hair Tonic

Kanegafuchi Spinning Co., Ltd.

Head Office: 123, Tomobuchi-cho, Miyakojima-ku, Osaka
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Main Products: Cosmetics, Toiletries, Textiles (Yarns, Fabrics and
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Tokyo 103, Japan
Tel.: Tokyo (03) 663-3311
Main Products: Toilet Soap, "Kao" & "Wide"; Shampoo, "Kao
Feather"; Hair Rinse, "Kao Tender"; Detergent
powder, "Blue Wonderful" & "White Wonderful";
Detergent liquid, "Wonderful K" & "My Pet";
Tooth paste & Tooth brushes, "Justo"; and
Insect spray killer, "Kiska"

Kenshi Seiko Co., Ltd.

Head Office: 39-17, 5-chome Minamisenju, Arakawa-ku, Tokyo
Tel.: Tokyo (03) 801-2131—3
Main Products: Kenshi brand; Hair Spray, Hair Tonic, Pomade,
Hair Cream, Hair Stick, Eau de Cologne and
Men's Toiletries

Kimigayo Co., Ltd.

Head Office: 20-15, 3-chome Asakusabashi, Taito-ku, Tokyo
Tel.: Tokyo (03) 851-4131—4
Main Products: "Kimigayo" Black Hair Dye, "Kimis" Black &
Brown Hair Dye, "Kimis" Black & Brown Hair
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Kiss Me Cosmetics Co., Ltd.

Head Office: 7, Goban-cho, Chiyoda-ku, Tokyo
Tel.: Tokyo (03) 262-3111
Main Products: Lipstick, Eyeliner, Liquid Foundation, Nail Polish, Eyeshadow, Make-up Cake, Brush Eye-Shadow, Cream Compact, Brush Compact, Rouge, Facial Creams, Lotions, Eau de Cologne, Perfume etc.

Kose Cosmetic Co., Ltd.

Head Office: 5-1, Tori-3-chome Nihonbashi, Chuo-ku, Tokyo
Tel.: Tokyo (03) 273-1511
Main Products: Skin Care Preparations, Make-up cosmetics, Hair Preparations, Fragrances, Men's Cosmetics.

Kurobara Honpo Co., Ltd.

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Tel.: Tokyo (03) 625-0040
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Main Products: Cleopatra Cosmetics
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Mitsuyoshi Co., Ltd.

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Main Products : Cosmetics for Television, Cinema & Stage Make-up

Momotani Juntanken Co., Ltd.

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Main Products : "Meisyoku" Astringent Lotion, Soft Astringent Lotion, Lemon Astringent Lotion, Cleansing Cream, Lemon Cleansing Cream, Soft Nourishing Milk, Soft Nourishing Lemon, Soft Nourishing Cream, Vanishing Cream with Hormone, "Almic" Baby Powder, "Nikibi Bigansui" Pimple Lotion "Jeunesse" all kind of cosmetics

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Oppen Cosmetic Co., Ltd.

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Osaka Toilet Goods Co., Ltd.

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Papilio Cosmetic Co., Ltd.

Head Office: 20-10, 3-chome Minami-azabu, Minato-ku, Tokyo
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Picaso Cosmetic Laboratory Ltd.

Head Office: 9-20, Ikedacho, Nishinomiya, Hyogo-ken, Japan
Tel.: Nishinomiya (0798) 33-5901
Main Products: Compact Powder, Cake Make up, Face powder, Liquid Foundation, Lotion, Milky Lotion, Face Cream

Pola Cosmetics Co., Ltd.

Head Office: 7-7 Ginza 1-chome, Chuo-ku, Tokyo
Tel.: Tokyo (03) 535-2151
Main Products: Skin Care Products, Make-up Products, Nail Products, Hair-Care Products, Fragrance Lines. For Men Products and Others

Rubotan Cosmetic Co., Ltd.

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Main Products: Eye Shape Liquid (Eye Liner), Hi-Shape Liquid (Eye Liner), La Donna Lip Stick, Eye Shadow Stick, Nail Polish Large size, Polish Remover Large size, Eye Ace (Eye Lid), Eye Lash Color (Mascara), Pearl Enamel, Eye Brow Pensil with Brush, Eye Brush Shadow

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Main Products: Cosmetics & Toiletries
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Main Products: Face Cream (Cold, Vanishing, Nourinshing, Cleanshing, Hormone), Lotion (Fruit, Milk, Astringent, Eau de Cologne), Lipsticks, Rouge, Eye brow pencils, Cake Make-ups, Hair Oil, Hair Cream, Hair dressing, Pomade, Perfumes, Face powder, etc.

Sunstar Dentifrice Co., Ltd.

Head Office: 3-1, Asahimachi Takatsuki, Osaka
Tel.: Osaka (0726) 82-5541
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Sunstar Brand Toothbrush for Adult and Children

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Head Office: 2-7-7 Toyotamakita, Nerima-ku, Tokyo
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Main Products: "Cappi" Perfume, "Cappi" Eau de Cologne, "Cappi" Nail Polish, "Cappi" Lip Stick, "Cappi" Eye Make-up Lines, "Cappi" Hair oils

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Head Office: 31, 3-chome Shin-ogawa-machi, Shinjuku-ku, Tokyo
Tel.: Tokyo (03) 269-7331
Main Products: Ideal Brand Cosmetics; Cream, Toilet Water, Make-up goods, Hair Goods, Eau de Cologne, Perfume

Tamura Jishodo Co., Ltd.

Head Office: 24 Yamasaka-cho 3-chome Higashisumiyoshi-ku, Osaka
Tel.: Osaka (06) 622-5501
Main Products: Hair-Grower-G, Hair Tonic, Eye Brow (Paint), Shampoo, Hair Brow (Internal), Hair Brow (Ointment)

The Lion Dentifrice Co., Ltd.

Head Office: 3-7, 1-chome Honjo, Sumida-ku, Tokyo
Tel.: Tokyo (03) 624-1111
Main Products: Toothpaste; White & White Lion, Etiquette, Dentor Lion, White Lion, Tooth Powder; Tobacoo Lion, Toothbrush; Rolling Lion, Bannet, Cosmetics; Vitalis, Vitalis Chevron

Utena Company, Ltd.

Head Office: 219, Karasuyama-machi, Setagaya-ku, Tokyo
Tel.: Tokyo (03) 303-4111-4
Main Products: "Utena" Milk Cream, Vanishing Cream, Cold Cream, Lemon Milk Cream, Face Powder, Lemon Milk Lotion, Homo Astringent, Men's Cream, Make-up Base, Eau de Cologne, Homo Skin Milk, Vitamine Lipstick, Flesia Astringent, Soft Make-up, Eye Shadow, Stick etc.

Yaetsubaki Hompo Co., Ltd.

Head Office: 6-9, 5-chome Asakusabashi, Taito-ku, Tokyo
Tel.: Tokyo (03) 851-5275, 5276
Main Products: "Yaetsubaki" Pomade, Hair Cream, Hair Oil, Hair Rinse, Hair Liquid, Camellir Oil

Yamahatsu Sangyo Kaisha, Ltd.

Head Office: 2, Dojima Kami 1-chome, Kita-ku, Osaka
Tel.: Osaka (06) 344-5770—9
Main Products: Feminine Hair Color, Ann Hair Color, Peacock Hair Dye, Paon Hair Dye, All kinds of Hair Preparations.

Yanagiya Honten Co., Ltd.

Head Office: 2, Tori-2chome, Nihonbashi, Chuo-ku, Tokyo
Tel.: Tokyo (03) 272-3781—8
Main Products: Pomade, Hair Tonic, Hair Cream, Hair Spray, Stick Brilliantine, Eau de Cologne etc.

ASSOCIATIONS OF THE INDUSTRY

Japan Cosmetic Industry Association

Head Office: Hatsumei Bldg., 17, Nishikubo-akefunecho Shiba, Minato-ku, Tokyo
Tel.: Tokyo (03) 502-0576
Osaka Office: 1, 2-chome Izumi-machi, Higashi-ku, Osaka
Tel.: Osaka (06) 941-2093
Nagoya Office: 25-7, 3-chome Marunouchi, Nakaku, Nagoya
Tel.: Nagoya (052) 971-1476
Representative Director:
Kozaburo Kobayashi
Masahiro Sakamoto

Managing Director:
Takeji Baba
Chiyoshiro Iwai

Japan Dentifrice Manufacturer's Association

Head Office: 3, 3-chome Bakurocho Chuo-ku, Tokyo
Tel.: Tokyo (03) 661-0825
Osaka Office: 1, 2-chome Izumi-machi, Higashi-ku, Osaka
Tel.: Osaka (06) 941-2093
Representative Director:
Atsushi Kobayashi
Hiroo Kaneda
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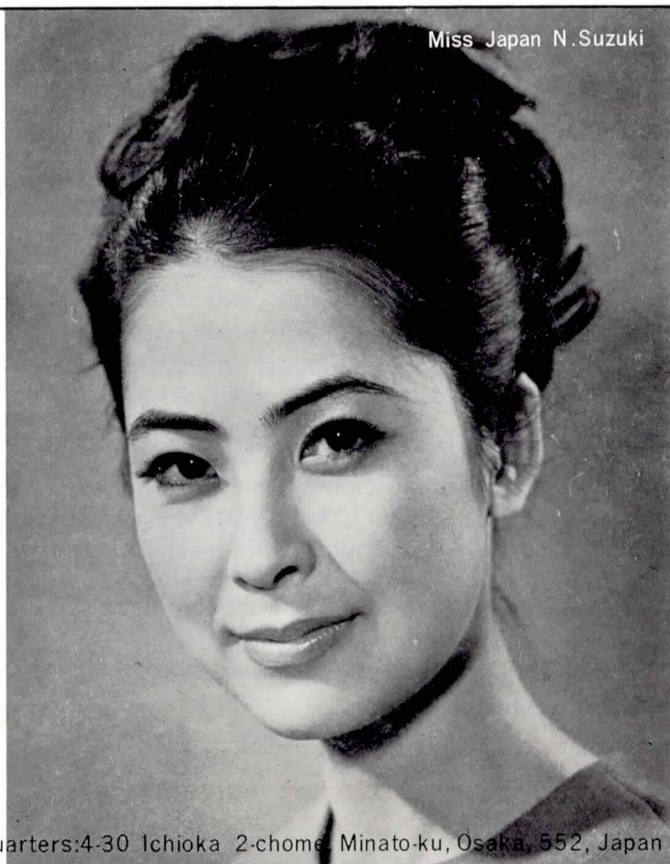
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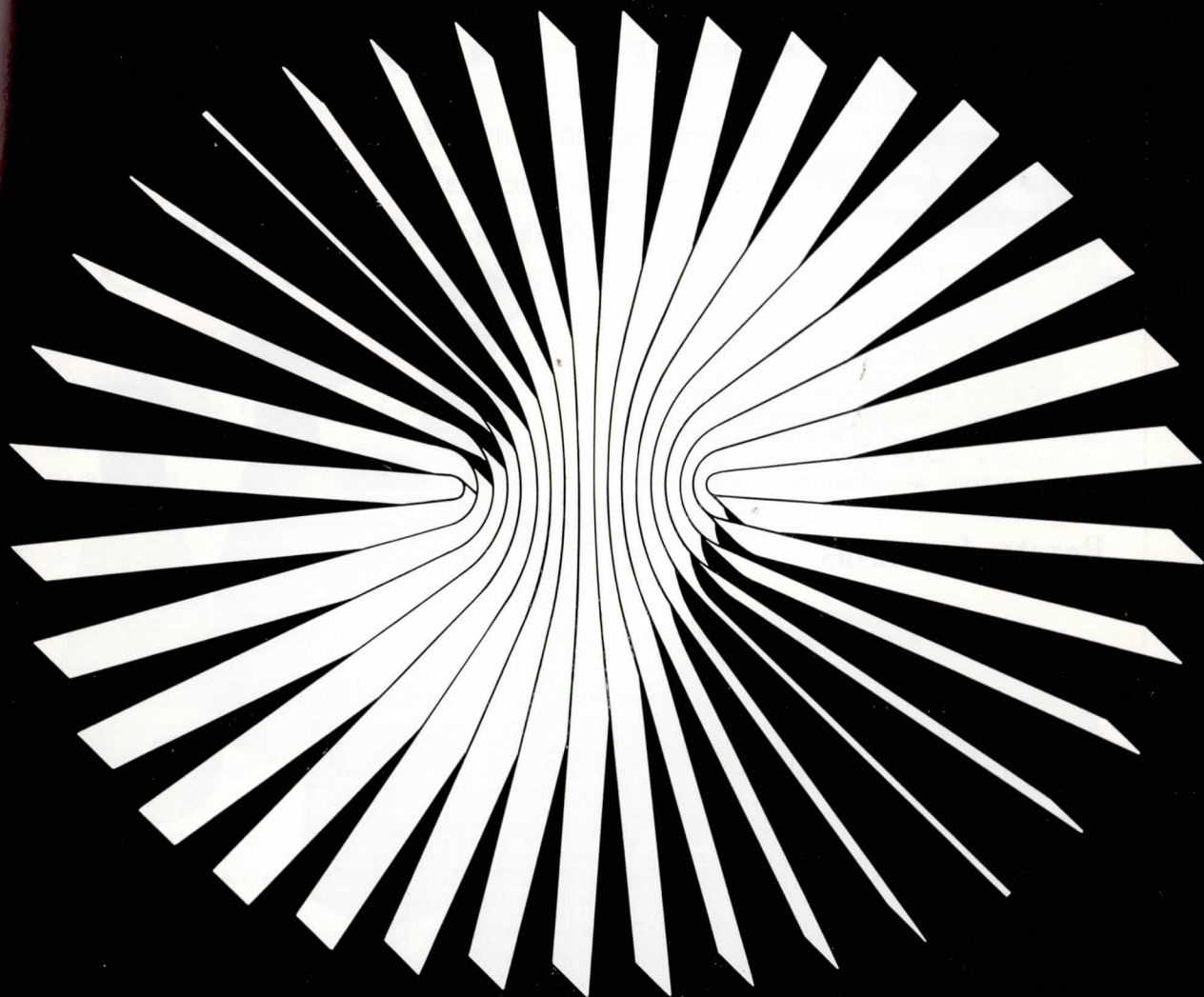
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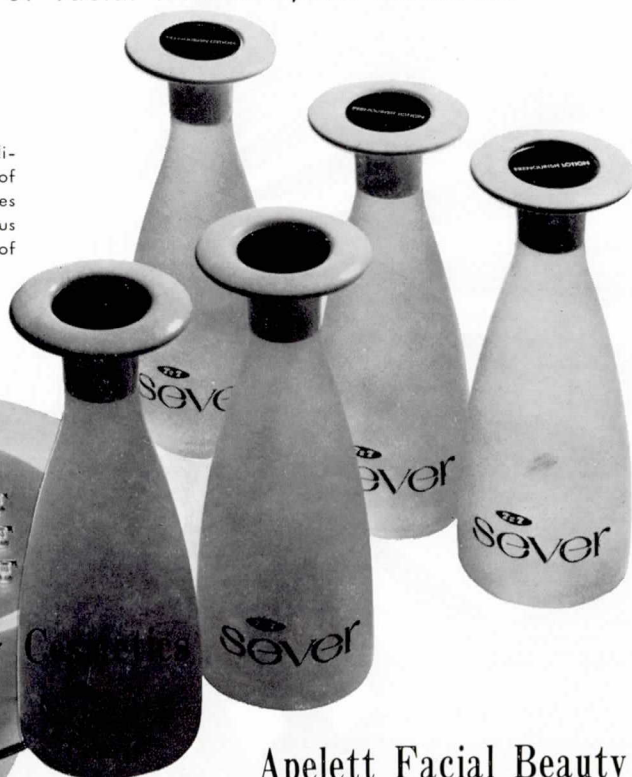
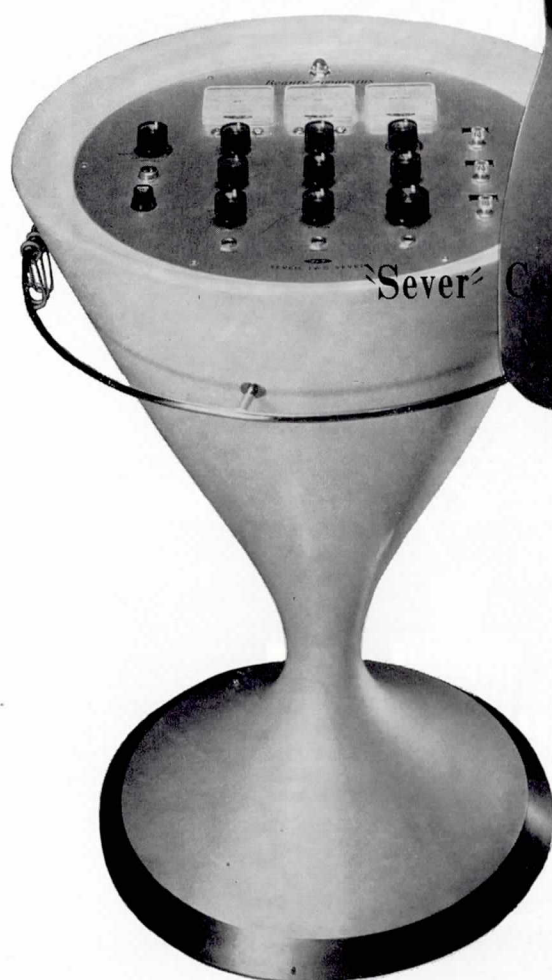


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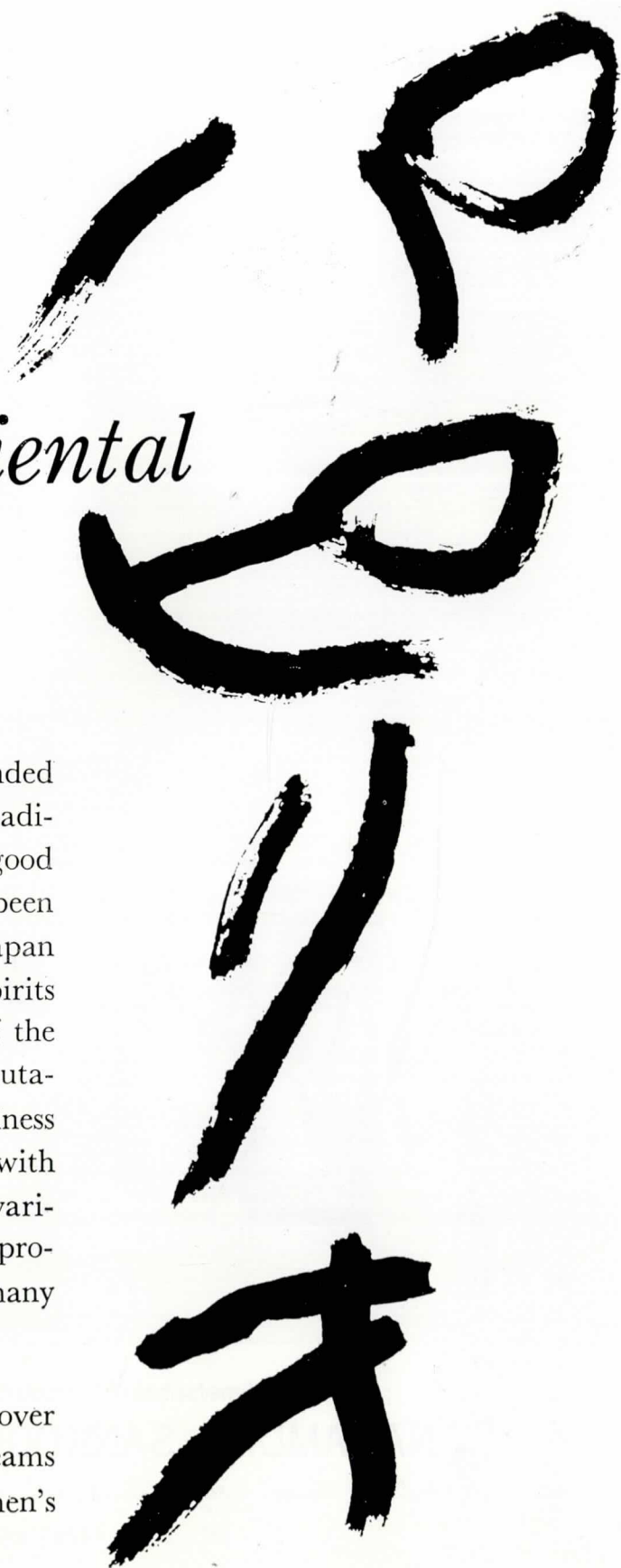
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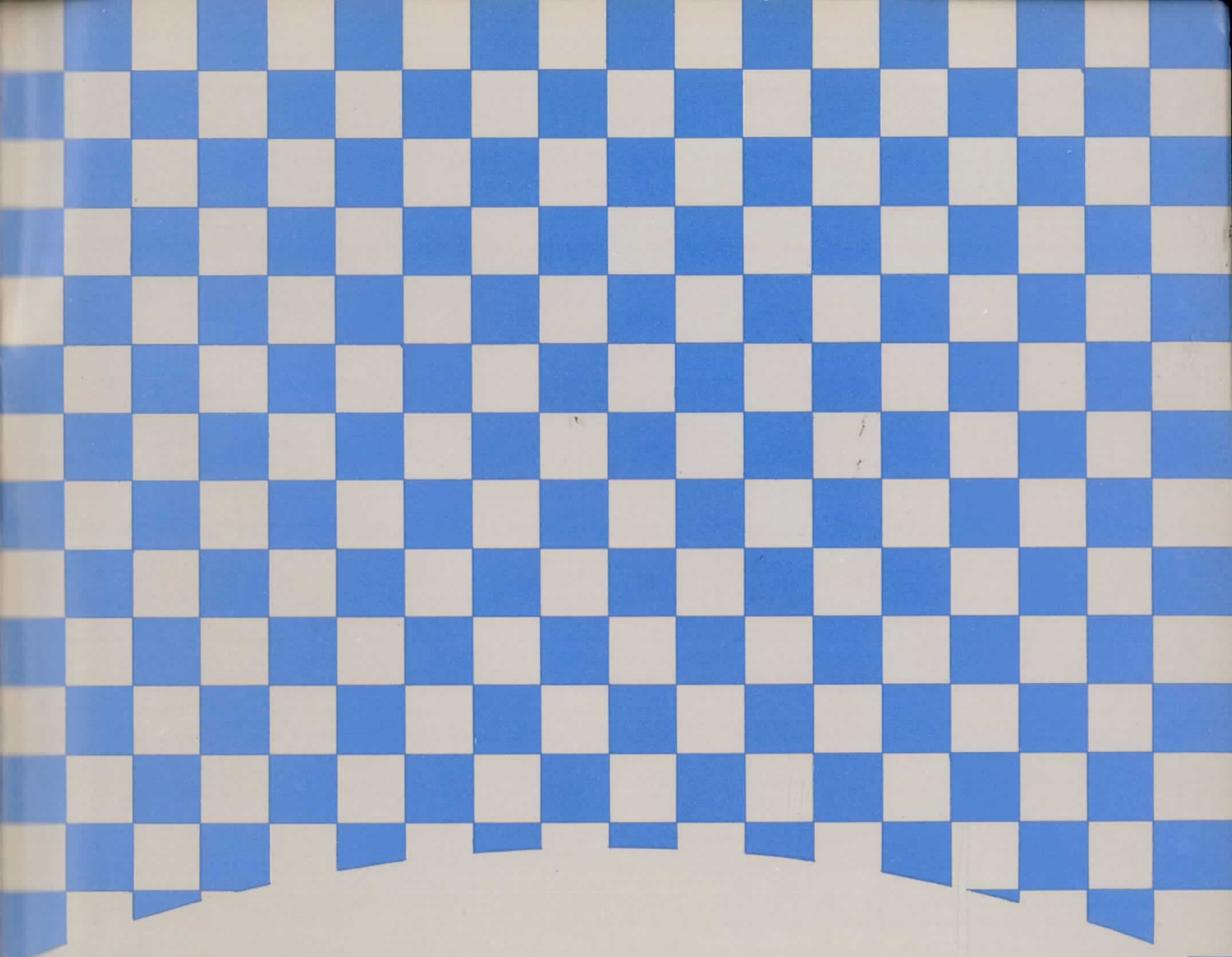


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発明会館四階

The Cosmetic Industry in Japan

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