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**JETRO**  
**Japanese Market**  
**Report** —Regulations & Practices—

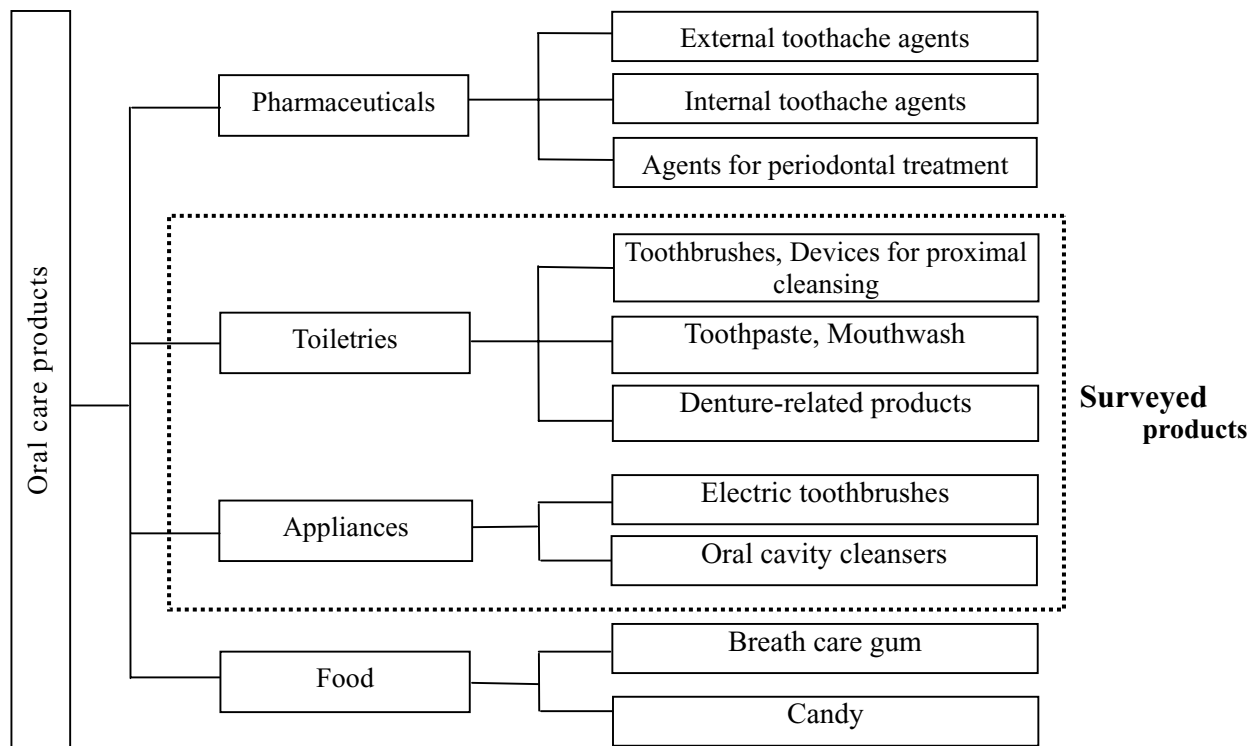
**Oral Care Products**

## Introduction

The Japanese public is paying more attention to oral care as a result of increased interest in health in general. Since oral care products are used every day, they represent a stable market and enjoy consistent demand throughout the year. Recently, the market has been polarized by the growth of both consumers who want lower-priced products, and those who prefer expensive, value-added products.

At present, most products in the Japanese oral market are from Japan. Most large Japanese producers also have tie-ups with overseas manufacturers to consign the production or sales of products in other markets under local brand names.

This report presents the current state and future prospects of the Japanese oral care product market, and also reviews opportunities for overseas companies to enter the market. This report basically covers the following areas of the market:



\* Oral cavity cleansers are not covered in the survey.

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**Appendix**

**Yen-US Dollar Exchange Rates**

End of Year	Yen/US\$
1997	129.2
1998	115.2
1999	102.1
2000	114.9
2001	131.5

Note : Mean value between offer and bid in the inter-bank foreign exchange market in Tokyo.

Source: Bank of Japan, "Financial and Economic Statistics Monthly"

## Summary

No official statistics are available on the size of the market for oral care products in Japan, but industry estimates put it at around ¥130 billion per year. The market consists mainly of toothbrushes (¥45 billion) and toothpaste (including mouthwash, ¥73.8 billion). Most of the oral care products are produced at Japanese plants operated by large Japanese manufacturers. Toothbrushes supplied to, such hotels, are mostly made by specialized producers in Japan.

Imports of oral care products in 2000, excluding electric toothbrushes, stood at ¥11.8 billion. The major countries exporting toothbrushes to Japan were Germany and China, while Ireland and the U.S. export toothpaste, dental floss and other oral sanitary products. The import and sales of oral care products are subject to the Household Goods Quality Labeling Law, the Pharmaceutical Affairs Law, the Electrical Appliance and Material Safety Law and other regulations.

Distribution routes for oral care products vary according to type of outlet and product. One of the main routes is from producers through wholesalers or sales agencies to retailers, and another is the direct route from producers to retailers. Toothbrushes supplied commercially are sold to hotels through specialized wholesalers, and to dental clinics through wholesalers of dental supplies. Electric toothbrushes are sometimes distributed by producers of electrical household goods to electrical household appliance stores and supermarkets through wholesalers of electrical household appliances.

Trading between retailers and producers, sales companies and various wholesalers is carried out under the commission agencies system (refer to note 2, III.B). The wholesale price for each item will be set at a percentage of the retail price requested by the producer. In some types of business, the retailer will require shelf allocation system (refer to Note 3, III. B. 1), a supply of manpower and rebates. The place of purchase depends upon the consumer's age group and sex etc. Volume retailers including supermarkets and drugstores, however, hold large shares.

One of the factors that is likely to affect the future oral care product market is the increasing attention paid by consumers to oral care as a result of the effective education program conducted by the Ministry of Health, Labor and Welfare, and oral care products manufacturers. While price was increasing, on the other hand, increase of consumer demand for value-added products have created new types of needs, which are expected to become the driving force in the market. Increase of aged rate is likely to expand the denture-related product market.

To access the Japanese oral care product market, it is necessary to develop products suited to the tastes of Japanese consumers. It may be appropriate to begin with mail order, which is an easier way to import products, after obtaining good information about the actual state of Japanese distribution networks.

Building a trading relationship with a wholesaler who has established relationships with miscellaneous and specialty stores, and then gradually expanding the sales channels is recommended. It is also worth trying to exploit the market with products that have not traditionally been available in

Japan.

For denture-related products, approaches to age groups who are potential users will be one effective measure. Finally, a full understanding of the laws and regulations including the Pharmaceutical Affairs Law is an important prerequisite for access to the market.

## I . Outline of the Market

### A . Market Scale

No official data is available regarding the size of the market for oral care products, except for toothpaste. According to the industry, the market for consumer products is around ¥130 billion annually. The toothpaste market including mouthwash was ¥73.8 billion in 2000, 90% of that from quasi-drugs<sup>1</sup>. The market temporarily expanded in 1996, reflecting the whitening toothpaste boom. However, the market growth has been sluggish since 1997.

Table 1 . Changes in shipment of toothpaste

(Units: tons, ¥ million)

	1997		1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Paste	49,311	67,010	48,278	64,721	48,522	62,231	48,436	62,630
Moisture-powder	158	159	144	145	137	139	130	131
Liquid	6,426	5,569	5,422	4,909	4,208	5,293	5,812	5,598
Mouthwash	8,090	6,165	6,420	5,369	6,637	5,058	8,174	5,507
Total	63,985	78,903	60,264	76,144	59,505	72,721	62,552	73,866

Source: Japan Dentifrice Manufactures Association

The size of the toothbrush market is around ¥45 billion but it has hardly changed in size and value. Toothbrushes for dental clinics seem to account for about 10% of toothbrush market. The size of the commercial toothbrush market - toothbrushes used at hotels, golf courses and saunas - has not been determined even by the industry. The number of users of these facilities has slumped since the start of the recession, so many facilities have stopped providing extra services in order to cut costs or in consideration of environmental problems. The commercial toothbrush market can be regarded as being in decline.

The size of the market for denture-related products (cleansers for dentures, denture adhesives) is estimated at around ¥10 billion. The market is expected to continue expanding due to the increase of aged people and diffusion rate.

The size of the market for electric toothbrushes is estimated at around ¥6 billion. The market has expanded since 1988 reflecting the increased attention paid by middle-aged people to periodontal diseases. In recent years sales values have grown slightly as prices have dropped, but sales volume continues to expand.

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<sup>1</sup> Refer to A under “II. Import system and related laws and regulations”

## **B . Trends in Domestic Supply**

Most of the oral care products traded on the Japanese market come from plants in Japan operated by large Japanese manufacturers such as Lion, Sunstar, Kao and Kobayashi Pharmaceutical. Overseas producers tie up with large Japanese producers, to whom they consign the manufacturing and sales of their products.

### **1 . Toiletries**

#### **a . Toothbrushes**

The toothbrush industry used to be a local industry supported by small and medium sized companies mainly in Yao City and Higashi Osaka City in Osaka Prefecture. Major manufacturers broke into toothbrush market and now they claim around 90% share of the market . Nevertheless, about 80 small and medium companies, mainly in Yao City, are still in operation, sometimes producing subcontracted products. Major manufacturers have the oral care brands whose assortments are toothbrushes and toothpaste while some brands specialize in toothbrushes. Some of the smaller manufacturers also have their own brands. Toothbrushes for accommodations are mainly produces by Japanese manufacturers, with hardly any of imported products from abroad.

#### **b . Devices for Proximal Cleansing**

Devices for proximal cleansing (interdental brushes, dental flosses, etc.) are supplied as a supplement ordinary brushing. The first products traded on the Japanese market were introduced in 1973 at dental clinics. The first product for ordinary consumers was “Butler Nylon Floss” produced by Naku Trading, which came on the market in 1977, followed by Johnson and Johnson’s “Dental Floss”. Some of the manufacturers produce floss-type products while others supply brush-type devices. At present, among interdental brushes market Jacks the largest share.

#### **c . Toothpaste**

Lion, Sunstar and Kao account for about 90% of the toothpaste market. Lion account for nearly 45% of the market. Each producer develops and supplies products with various brand names and features, such as whitening effects, the prevention of periodontal diseases and tooth decay and bad breath. Smithkline Beecham, which dissolved its partnership with Sunstar in 1997, sells “Aqua Fresh” independently.

#### **d . Oral cleansers**

The mouthwash market started when Warner Lambert’s “Listerine” was introduced in 1986. Other manufacturers followed suit but some manufacturers reduced or their products withdrew from



the market. Sunstar is currently the largest producer in mouthwash market.

#### e . Denture-related products

The market started in 1951 when Kobayashi Pharmaceutical launched the “Polident” denture cleanser, and the “Poligrip” denture adhesive, produced by the Block Drug Co. of the U.S. In 1976, two companies were merged and established Kobayashi Block, which started manufacturing the products. Kobayashi Pharmaceutical was in charge of sales. In 1996, this partnership was dissolved and the sales rights were transferred to Earth Chemical. Kobayashi Pharmaceutical currently supplies “Toughdent” and “Toughgrip” as original brands.

#### 2 . Electric devices (Electric toothbrushes)

In addition to overseas producers and mail order companies that have sold such devices for years, household electric appliance manufacturers, producers of toiletry products such as toothbrushes and toothpaste, etc. have advanced into the electric toothbrush market. The bodies of electric toothbrushes are produced by electric appliance manufacturers, and the brush parts by brush manufacturers.

### **C . Trends in imports**

As shown in Table 2, the total import value of oral care products excluding electric toothbrushes, climbed to ¥11.8 billion in 2000 (increase 15.7% from the previous year).

The number of toothbrushes consumed in Japan is estimated at 450 million per year. This means that the number of imported toothbrushes, which are shown in Table 2, accounted for around 20% of the toothbrushes traded on the Japanese market in 2000. By countries, on value, Germany, with Braun and Terradent producing high- grade products, represent 46.2% of the total value. On a volume basis, China accounts for 36.7% of the total, and is higher than the 20.3% held by Germany. But these figures are small in comparison with the whole Japanese toothbrush market. In addition, these figures seem to include a considerable number of toothbrushes produced by Chinese subsidiaries of Japanese producers or OEM products from Japanese manufacturers. The export value and volume of Chinese manufacturers, the share of export to Japan is small. Among Chinese products exported mainly through trading companies with export rights.

Toothpaste, dental floss, and other oral sanitary products are imported mainly from Ireland and the U.S.

Figures for electric toothbrushes are included in the figures for household electric appliances, and exact figures on the import volume or value of electric toothbrushes are not available. The market,

however, estimates the number of toothbrushes imported every year at around 100,000. The major exporting countries are the U.S. and Germany.

Table 2 . Trend in imports by item

(Units: 1,000, ¥ million)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Toothbrushes	78,329	3,307	83,880	2,935	94,691	3,306
Toothpaste	–	5,255	–	4,716	–	5,507
Dental Floss	–	494	–	405	–	451
Other Oral Sanitary Products	–	2,219	–	2,170	–	2,563
Total		11,274		10,226		11,828

Source: Customs Statistics supplied by the Ministry of Finance

Table 3 . Export trend by major countries for toothbrushes

(Units: 1,000, ¥ million)

Name of Country	1996	1997	1998	1999	2000	
	Value	Value	Value	Value	Value	Volume
Germany	549	588	1,511	1,229	1,529	19,176
U.S.	514	739	784	641	488	6,419
China	440	605	587	479	480	34,773
Thailand	74	150	209	270	348	13,632
Korea	79	57	81	197	331	18,225
Others	342	311	136	119	132	2,467
Total	1,998	2,451	3,307	2,935	3,306	94,691

Source: Customs Statistics supplied by the Ministry of Finance

## **II . Import system and related laws and regulations**

### **A . Regulations and procedures for importing**

Toothpaste comes under the quasi-drugs and cosmetics bracket of the Pharmaceutical Affairs Law. The act defines the following as quasi-drugs: products that have a mild effect on the human body; that prevent nausea and other indispositions foul breath or body odor, and prickly heat, sore and the like ; that prevent hair loss or promote hair growth, and hair removers etc.. Cleanliness and beauty products are defined as cosmetics. Importers of cosmetics or quasi-drugs as specified by the Pharmaceutical Affairs Law have to obtain permission for import and sales, and approval or permission for each item as shown below.

- Acquisition of permission for import and sales

All businesses intending to import the products in question must apply to the Minister of Health, Labor and Welfare through the Drug Management Section of the relevant prefectural government. They are then inspected to make sure they have the competent equipment and qualified pharmacists prescribed by law before written permission for import and sales is given.

- Approval or permission for import of each item

Permission must be obtained for each item to be imported, and permission can be obtained only after approval is given. Application should be made through the Drug Management Section of the relevant prefectural government, and written approval will be given after the quality, efficacy, and safety, etc. are confirmed. Only permission is required for products already approved or not requiring approval.

### **B . Regulations and procedures for sales**

Sales of toothbrushes (excluding disposable brushes, denture brushes, and toothbrushes for medical treatment) are subject to the Household Goods Quality Labeling Law. Sales of electric toothbrushes with rechargeable batteries are regulated by the Electrical Appliance and Material Safety Law. Toothpaste sales are regulated by the Pharmaceutical Affairs Law.

#### **1 . Household goods quality labeling law**

The act specifies major household articles for family use, and requires their labeling. As one

of the specified items, toothbrushes must be labeled. Unlabeled products cannot be put on the market (refer to . C. for details).

## 2 . Electrical Appliance and Material Safety Law

As electric toothbrushes with rechargeable batteries are defined by the law as “electric appliances”, producers and importers must fulfill the following obligations.

- Notification of start of business

Businesses must submit a “Notification of Start of Business” to the Director of the Bureau of Economy, Trade and Industry under the Ministry of Economy, Trade and Industry that supervises its offices, etc. (to the Minister of Economy, Trade and Industry if the entity has offices in several different areas) within 30 days of starting business.

- Compliance with standards

A business entity that sells these products must comply with the technical standards specified by the act. Compliance, however, shall be monitored by the entity itself.

- Obligation of Labeling

Products must be labeled in accordance with the specifications for each item. Unlabeled products cannot be put on the market

## 3 . Pharmaceutical Affairs Law

Permission must be obtained for the sales of pharmaceuticals regulated by the act. The sales of quasi-drugs and cosmetics is not subject to the regulations, including those drugs requiring the acquisition of a license.

regulation. The act, however, regulates the advertising and labeling of quasi-drugs and cosmetics.

## **C . Labeling**

### 1 . Obligatory labeling in compliance with laws

#### a . Labeling in compliance with the Household Goods Quality Labeling Law

The labeler is obliged to specify the quality of the handle, material of the brush, toughness of

the brush, thermal resistance, and the name and address/telephone number of the labeler by the Household Goods Quality Labeling Law. Each minimum sales unit must be labeled.

<Example of Labeling>

Labeling in Compliance with the Household Goods Quality Labeling Law			
Quality of handle	Material of brush	Toughness of brush	Thermal resistance
Polypropylene	Polypropylene terephthalate	Normal	80°C
ABC Co., Ltd. Address:			

Note: The toughness of the brush is according to the JIS standards.

b . Labeling in compliance with the Electrical Appliance and Material Safety Law

For electric toothbrushes with a rechargeable battery, the name of the producer/importer, the rated voltage, rated power consumption, rated frequency, etc. must be labeled. This label must be affixed to an easily seen surface using a method that prevents the label from easily becoming illegible.

<Example of labeling>

ABC Co., Ltd. AC 100V 50 – 60Hz 2W
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c . Labeling in compliance with the Pharmaceutical Affairs Law

The act stipulates that the labeler must include necessary items in compliance with the law and must not make false descriptions.

The matters to be labeled for quasi-drugs are as follows.

- Name and address of the producer or the importer
- The words “Quasi-Drugs”
- Name of product
- Production number or production mark
- Weight and the number of items contained
- Name and quantity of effective ingredients as for quasi-drugs designated by the Minister of Health, Labor and Welfare
- Use-by date as for quasi-drugs designated by the Minister of Health, Labor and Welfare

2 . Voluntary labeling in compliance with laws

<Labeling under the Third Party Certification System >

The producer can affix an “S-mark” to an electric toothbrush with a rechargeable battery. This is a system of third party certification under which private companies who entrusted by the

national government certify entities that the product satisfies or exceeds a certain level of safety at the request of producers, importers, or sales. Organizations such as the Japan Quality Assurance Organization (JQA) and the Japan Electrical Safety and Environment Technology Laboratories (JET), carry out production tests, plant inspections, etc. and products whose safety has been certified can carry the JQA mark or the JET mark. The mark used is a combination of the safety mark designated by the Electric Appliance Certification Conference and the logo of one of the certification organizations.

Product Certification Department, Japan Electrical Safety and Environment Technology Laboratories (JET) Tel: 03-3466-5183

Japan Quality Assurance Organization (JQA) Tel: 03-3416-0128

### 3 . Voluntary labeling of the industry

The Japan Dentifrice Manufactures Association designated the labeling of all the ingredients included in toothpaste on the package etc. of all new toothpaste categorized as a cosmetic from April 2001 onwards. The association has also established guidelines for fair trade, “Fair Trade Guidelines for Toothpaste Labeling” and “Fair Trade Guidelines for Restriction of Premiums in the Toothpaste Business”.

## D . Taxation System

### 1 . Customs

The customs tariff is 8% for toothbrushes, 4% for dental floss and 5.8% for other oral care products. Electric toothbrushes and toothpaste are duty free.

HS No.	Type of Product	Customs Tariff			
		General	WTO	MFN applied	Provisional
8509	Household electric appliances (limited to those with a built-in electric device)				
.80-000	Other devices	duty free	(duty free)		
9603.21-000	Toothbrushes (including toothbrushes for dentures)	8%	6.6%	duty free	
3306.10	Toothpaste	duty free	(duty free)		
3306.20	Dental floss	4%	2.7%	duty free	
3306.90	Other oral or dental hygiene, including denture fixative pastes and powder	5.8%	duty free	duty free	

Source: “Effective Customs Tariff” by the Japan Tariff Association

## 2 . Consumption Tax

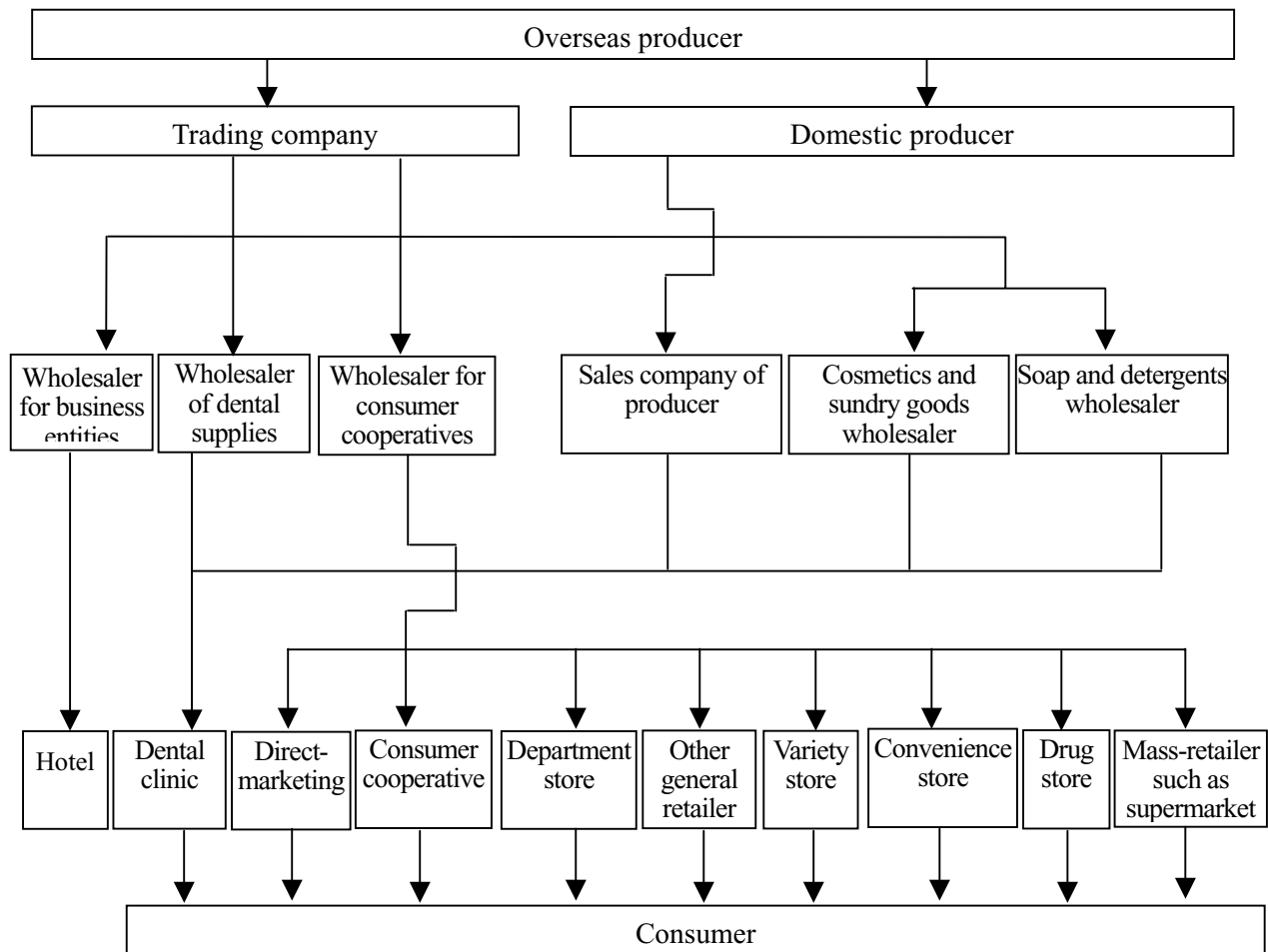
$(\text{CIF value} + \text{customs}) \times 5\%$

### III . Distribution system and commercial practices

#### A . Distribution route

As shown in Figure 1, there are a variety of distribution routes for oral care products, depending upon the type of retailer and the product. Among them, electric toothbrushes (excluding some low-priced products) go through completely different routes involving household electric appliance producers and trading companies, which are shown separately in Figure 2.

Figure 1 . Distribution route for oral care products (excluding electric toothbrushes)

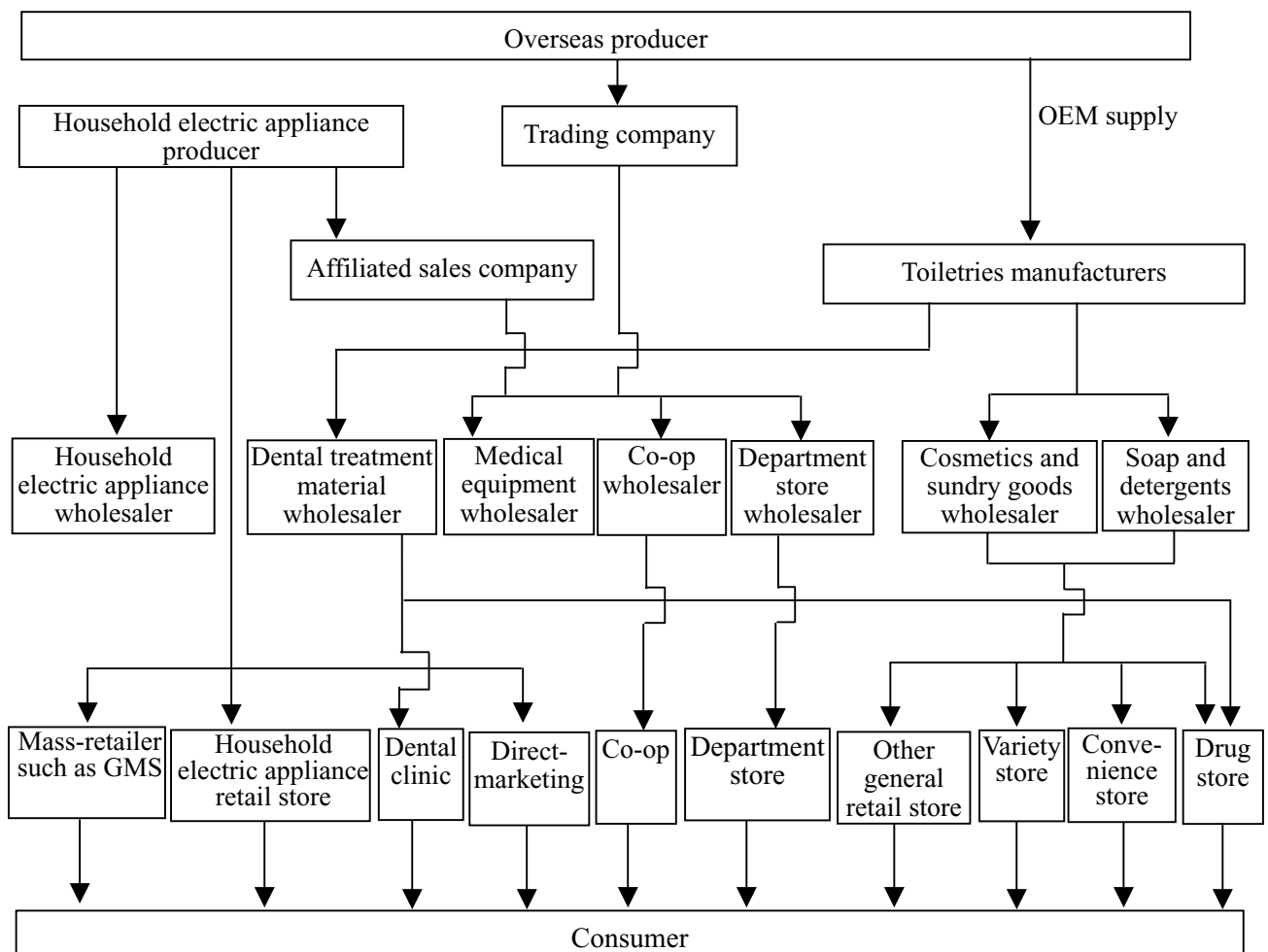


As shown in Figure 1, the distribution routes for oral care products excluding electric toothbrushes can be broadly divide into the following six, depending upon their retail formats.



1. Producers distribute products to retailers through soap and detergents wholesalers or cosmetics and sundry goods wholesalers.
2. Sales companies of producers directly distribute products to retailers.
3. Producers sell products directly to retailers without the intermediary of wholesalers or sales companies of producers.
4. Producers and trading companies distribute products to hotels, etc. through wholesalers for business entities.
5. Producers and trading companies distribute products to consumer cooperatives (co-ops), which have been organized all over Japan under a membership system, through wholesalers exclusively for co-ops.
6. Producers and trading companies distribute products to dental clinics or retailers through wholesalers for dental supplies.

Figure 2 . Distribution route for electric toothbrushes



As shown in Figure 2, there are three main routes for electric toothbrushes.

1. Toiletry producers distribute products to retailers through soap and detergents wholesalers, cosmetics and sundry goods wholesalers or dental treatment material wholesalers.
2. Trading companies distribute products retailers through department store wholesalers.
3. Household electric appliance producers sell products through group sales companies or household electric appliance wholesalers.

These routes differ slightly from those shown in Figure 1, mainly due to differences in price zones and the business categories of the producers. Products of household electric appliance producers are higher priced and go through different distribution routes. Therefore, they are not sold in sales spaces for toiletry products that do not handle electric appliances.

On the other hand, lower-priced products supplied by toiletry manufacturers are not placed in sales spaces for household electric appliances.

In a new development, Mitsui & Co. is selling the “Sonicare” electric toothbrush produced by Phillips Oral Healthcare of the U.S. In this case, the trading company trades directly with retailers as a Japanese agency of the overseas producer.

## **B . Business practices**

Trading between producers, sales companies, various wholesalers and retailers is based upon a commission agencies system<sup>2</sup>. Each wholesale price will be set at a certain percentage of the retail price requested by the producer. Final wholesale prices, however, differ significantly depending upon the distribution routes, types of products and retail categories. Types of products handled and business practices also differ.

### **1 . Mass retailers including supermarkets**

Oral care products are sold in sales spaces for bath and toiletry products mixed with sales spaces for foods. Many different oral care products are sold but mainly those made by the larger manufacturers. Only one or two types of electric toothbrush are sold since most customers are housewives. Toothbrushes produced by household electric appliance manufacturers are sold in the sales spaces for household electric appliances because of the differences in distribution routes and price zones.

Oral care products sold at mass retailers including supermarkets consist of two types: regular items that are displayed on shelves on a consistent basis and spot items that are sold only for a limited

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<sup>2</sup> A system where retailers designate a wholesaler for each category or producer.

period of time. Decisions are made twice a year about which regular items will be handled, while decisions for spot items are made on an occasional basis. Because of this, manufacturers often place new products on the market to coincide with the twice a year shelf allocation<sup>3</sup>.

Retailers take into consideration wholesale prices, profit margins, sales performance from the POS data, frequency of commercials in the media, performance in other areas, and so on when deciding what products to sell. Standardized size and packing formats to make the best use of limited shelf space is essential. Products failing to do so will not be accepted by retailers, even if all other conditions are satisfied.

Retailers often require trading producers or agency wholesalers to supply manpower on a regular basis to help with inventory clearance, sales, etc. and to pay commission for using their distribution centers, annual rebates based upon sales results, and a variety of cooperative fees. In recent years they are increasingly demanding cuts in wholesales prices to enable them to survive price competition with the drugstores, and the acceptance of returned goods. This is increasingly causing problems for small producers and wholesalers. Supermarkets are one of the most difficult to break into the markets for overseas makers.

## 2 . Drug stores

Since 1950, the drugstores have tried to increase product range, number and size of stores, and introduced a chain stores system. They have cut prices by bulk and mass purchasing, and are now price leaders in the market. Also, they handle a variety of products in addition to drugs: health foods, cosmetics, bath and toiletry products, stationery, beverages, sundry goods and brand-named goods. Thus, drugstores have moved closer to the needs of consumers, who are mainly young women, than supermarkets and convenience stores. Drugstores have advantages over mass retailers and supermarkets such as a wider variety of products, lower prices, convenient locations and longer opening hours. They handle oral care products as variously as mass retailers a variety of products produced by pharmaceutical manufacturers, beauty products, and items for the older generations. They have been active in introducing imported goods and special products, aiming at differentiating themselves from other shops, and this makes them more open to overseas producers.

The two main sales methods are a shelf allocation system, similar to that adopted by the mass retailers for regular items, and a bargain sale method for products displayed at the store. Shelf allocation is usually revised more frequently than at mass retailers - about four times a year For new

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<sup>3</sup> Retailers decide on the selling place and the number of displays for each item or each type of product. Chain stores adopt a chain operation system where all stores sell the same types of products in the same manner. This makes it necessary to agree upon a display pattern common to all stores in the same chain. This process of agreeing on a display pattern is called shelf allocation. The display pattern is fixed by the shelf allocation process and is then common to all stores in the same chain, though it sometimes differs depending on availability of sales space, and geographical region.

products, it is revised case-by-case basis. Shelf allocation in drugstores is not as standardized as the mass retailers, and is usually decided by the store manager or agency wholesalers on follow-up visits. If a product runs out it will quickly be replaced with another manufacturer's product, resulting in a loss in share. This is because in many cases it is the agency wholesaler or a sales company of the producer that places and accepts orders for products and maintains the store shelves on the store's behalf. At the same time, wholesalers need to strive to maintain and expand trade through consistently supplying manpower to assist with inventory clearance, refurbishing, etc., helping newly opened stores, by cutting wholesale prices, and offering additional, free merchandise based on amounts purchased.

### 3 . Convenience Stores

There are about 40,000 convenience stores all over Japan, most of which are open for twenty-four hours a day, except in remote areas. It is an important retail category for food producers and other manufacturers producing expendables. Their advantages are unlimited opening hours, and convenient locations. Over 60% of the products sold at convenience stores are foods, and the others are bath and toiletry products, stationery and books, cosmetics, sundry goods including underwear, cigarettes, payment services for public utilities charges, door-to-door delivery services, and various ticket sales. They only carry sundry goods that customers are likely to need at short notice. With oral care products, too, they usually carry only one of each type of product, so being selected as a convenience store product is extremely difficult.

Shelf allocation of foods and goods is revised frequently for foods and seasonal goods, but only once a year or so for oral care products. Products are generally sold at fixed prices, but wholesalers are required to supply products at the same wholesale prices as for mass retailers and drugstores. This reflects the policy of convenience stores of compensating for lower turnover rates with higher margins, which also has the advantage of preventing price erosion. Some producers supply products at strategic prices aimed at gaining nationwide recognition and a larger share of the market. Convenience stores select goods based on wholesale price, frequency of advertising, past results in other retail stores and so forth. But some of them also introduce special or unusual products to differentiate themselves from other convenience stores from time to time. Convenience stores do not require for producers manpower to assist with various tasks as much as the mass retailers and drugstores do. However, they are very sensitive about being out of stock, and are thus unsuitable to producers and wholesalers who cannot guarantee a steady supply of products.

#### 4 . Variety Stores

Variety stores sell an array of products, mainly electric appliances, imported sundry goods including brand-name goods, and clothes. They also sell most oral care products, including electric toothbrushes. Variety stores put an emphasis on the sales of niche products such as imported products and electric toothbrushes, to avoid price competition with mass retailers like supermarkets and drugstores. Their sales price zones are comparatively high. Their agency wholesalers are mainly cosmetics wholesalers, and sundry goods and others are small or medium import wholesalers also engaged in imports. Stores handling electric appliances purchase products from group sales companies of the household electric appliance manufacturers, as well.

Mass retailers including supermarkets, convenience stores, and drugstores that mainly sell products from the large manufacturers demand uniformity in size and packaging. But variety stores are more interested in new ideas and novel features not found in Japanese products. In selecting their products, they try to avoid products that are likely to face price competition from other types of retailers, and choose products with multiple uses, unconventional designs, and that offer higher performance even though they may be slightly more expensive.

Variety stores do not insist on lower wholesale prices because they are unlikely to face competition for the products they handle from other types of retailers, and do not sell goods at lower prices. They do not require rebates or assistance with manpower, either, which makes them ideal for the distribution of imported goods. Variety stores, however, have fewer stores than the mass retailers, convenience stores and drugstores, and have not adopted the chain-store system. And sales at variety stores tend to be low except for popular products.

#### 5 . Department Stores

Department stores, which mainly sell expensive consumer durables, have traditionally handled only a very small volume of cheap expendables. In addition, oral care products are usually displayed in the household goods and electric appliance areas in stores, areas that are shrinking due to the recession and the emergence of other types of retailer. In practice, it is almost impossible to sell oral care products, whether domestic or imported, to department stores.

#### 6 . Consumer Cooperatives

Consumer cooperatives (co-ops) are located all over Japan and have special distribution networks.

They adopt two types of sales channels. One is joint purchasing, where members form groups to order products shown in pamphlets, and the purchased products are delivered to each group.

Another is through Co-op shops. Members are required to pay membership fees. Co-op stores handle the goods like general supermarkets. The pamphlet-based sales method ensures a variety of types of products including foods, clothes, general expendables, sundry goods, and electric appliances.

In selecting goods, co-ops give priority to quality, safety and environmental considerations. It should be noted that co-ops have their own voluntary regulations governing the ingredients and safety of goods, in addition to the existing general laws and regulations. Many of the customers are housewives with children, who are increasingly concerned about safety and the environment. They do not sell the same oral care products as ordinary retailers, in order to avoid price competition and because of their own regulations, but they offer novelty goods, and safe products. They do sell some products handled by ordinary retailers as well. In general, co-op products are distributed by dedicated wholesalers.

Products to appear in the pamphlets are usually selected from three to six months before the pamphlets are distributed and the expected supply volumes are fixed two months before the products appear in the pamphlet. With imported products, it should be noted that in many cases products cannot be ordered and delivered within these lead times. Expected volumes are no more than estimates. Producers must provide the number of products actually ordered even when this exceeds estimates. On the other hand, if the actual order volumes are lower than this number, the producer may take the risk of carrying excess stock. In other words, stock control is the most critical part of the co-op route. Consequently, producers who supply products to co-ops, also have other distribution routes with a consistent turnover of products to maintain the balance of stock. Co-ops do not request assistance with manpower, but it is very risky for small producers who don't have other routes to break into the market.

## 7 . Direct-Marketing

The main characteristic of mail order is that low-priced products are not sold. The mainstream oral care products sold by mail order are expensive, goods like electric toothbrushes, and other items. The quality, features, profit margins, etc. of products frequently affect the selection of products by mail order retailers. Products are not likely to face competition from other mail order retailers are suitable. Another important requisite is stable selling price manufacturers because mail order retailers sell products over long periods of time. Many mail order retailers do not want to handle the products by household electric appliances because the wholesale prices and margins are much higher and than products by bath and toiletry manufacturers. Large mail order companies issue catalogs twice a year, selecting products six months or more before their catalogs are published. This makes it very difficult for mail order companies to forecast customer needs and judge the freshness of their products. And suppliers are required to promise a steady supply of products for six months.

## 8 . Dental Clinics

In general, oral care products sold at dental clinics are from dental supplies wholesalers. The selections of goods depends upon the dental clinic, but many of the goods are not same as general retailers. However, dental clinics handle the same types of electric toothbrushes as other retailers, and the variety has expanded in the last four to five years. Dental clinics have traditionally sold toothbrushes and devices for proximal cleansing to outpatients with giving guidance on oral care. Recently, more and more dental clinics recommend and sell electric toothbrushes.

Many products, including interdental brushes and dental floss, have become general products as a result of directions given by dentists and the educational efforts of large oral care products manufacturers. Variety stores also started selling products sold at dental clinics four to five years ago, promoting them as 'exclusive products'

## 9 . Hotels

Toothbrushes supplied for use in hotels, etc. are sold by specialized wholesalers. These wholesalers also often handle general disposal goods for accommodations and monopolize this distribution channel. Especially the market of toothbrushes is virtually monopolized by specialized producers, with general oral care products manufacturers holding only a very small share. Some smaller wholesalers and manufacturers have gone bankrupt out during the recession and now the large manufacturers and wholesalers dominate the market. Toothbrushes supplied commercially are priced at less than 50% of those sold in general retail stores, making it difficult for manufacturers of general products traded on the market to expand their share.

## 10 . Household Electric Appliance Stores

Household electric appliance stores sell electric toothbrushes by domestic producers, and very occasionally, imported products too. They also sell denture washers and oral cavity cleansers. Many chain mega stores of household electric appliance have a point card service system to refund 2% to 15% of the purchase price to the customer next purchase. This is essentially a markdown. Under this system, producers frequently bear the burden of refunds.

Some household electric appliance store chains demand that wholesalers assist by providing manpower for stock taking, refurbishing, and at the opening of a new shop, to cooperate by offering bargains at sale times, and/or to pay annual rebates. This, together with the burden of development cost and product guarantee costs, makes these stores the most difficult area for overseas producers to do business with.

## **IV . Consumer Trends**

### **A . Place of Purchase**

Consumers go mainly to mass-retailers, such as supermarkets, and drugstores to purchase oral care products.

Girl students and young working women often go to a drugstore or a convenience store to purchase these products. Because these shops are often located on the way to work or school, and carry a wide variety commodities including cosmetics, hairdressing materials, and sanitary products.

Many housewives purchase these products with food at the supermarket. Housewives tend to put a high priority on lower prices.

As the main purpose of daily shopping for older age groups is buying food, both men and women tend to buy their oral care products at supermarkets. However, the recent increase in drugstores has led to more elderly people buying oral care products there along with medications.

Individual males buying for themselves, are mainly high school students and older. Compared with women, a far smaller percentage of married men or boys younger than high school age buy these products themselves, as they usually use things kept in reserve at home. Regular male buyers are university students age and over and single men. They usually buy these products at drugstores or convenience stores. As these buying trends, manufacturers research and development mainly for women.

### **B . Trend by Type of Product**

#### **1 . Toiletries**

##### **a . Toothbrushes**

Toothbrushes tend to be used compact heads and rubber handles. Manufacturers are trying hard to give their products individuality by offering features like easier brushing. They are also seeking to improve cleaning efficiency through the introduction of new head angles, shapes and specification of brushes. They are also eager to introduce high-priced products into the market. The sales of “Dentar Systema” by Lion, whose selling points are plaque removal and gum protection achieved by using extremely thin brush hairs, are growing despite high prices. Sunstar’s “GUM” is another established brand enjoying continuing demand.



#### b . Devices for Proximal Cleansing

“Dental Floss”, a floss product by Johnson & Johnson, “Ito Yoji”, a floss-and-pick product with a handle produced by Kobayashi Pharmaceutical that has a strong brand name are popular, Among interdental brush and the “Dental Pro Interdental Brush” made by Jacks which is popular for its professional image, are selling well. As dental floss is difficult to use, floss-and-pick type products and interdental brushes are ideal for attracting new users. All the manufacturers are anxious to meet new market needs and maintain existing demand, hence the array of carrying cases and expanded variety of designs, sizes, etc. The market is increasingly seeing products with many features such as floss coated with tooth decay-preventing ingredients.

#### c . Toothpaste

Lion’s “WHITE & WHITE Prime Lion” offering improved whitening at a lower price is the most popular products in toothpaste market. Purchasers of the product range from students to housewives. Smithkline Beecham’s “Aqua Fresh”, in its package with the unmistakable color stripes is also selling steadily with brand rating. Stand-up type tubes have become the most popular since they save space and the toothpaste can be used-up.

#### d . Mouthwash

Three products vie with each other in this market: Sunstar’s “GUM” stresses efficient prevention of periodontal disease bacteria; Earth Chemical’s “Mondamin” emphasizes breath-care, and Warner Lambert’s “Listerine” its strong germicidal power. Lion’s “Xylident” contains xylitol is popular too. Larger quantities at lower prices are common trends for the products of all manufacturers. In the meantime, some products have failed to achieve market growth because their taste does not appeal to consumers. Features alone do not necessarily lead to larger market shares.

#### e . Denture-Related Products

Among denture adhesives, “Poligrip” (Earth Chemical) has been consistently popular. Adhesives have not, however, become as widely available as denture cleansers. Earth Chemical’s “Polident” enjoys the largest share of the cleanser market. Sales are growing for Kobayashi Pharmaceutical’s “Toughdent”, whose commercials use TV personalities well known to the older age groups, and “Partial Dent”, which has exploited new demand for partial dentures, and both products are gaining increased recognition. The trend is for each product to be sold in larger-volume packages and at increasingly lower prices.

## 2 . Appliances (Electric Toothbrushes)

Minimum's "Hapica Poy" is one of the most popular products below ¥1,000, and Sunstar's "GUM Electric Toothbrush" one of the most popular at around ¥3,000. These products have succeeded in attracting consumers who are more concerned about oral care, because they are widely available at drugstores and offer higher cost performance. "Sonicare" (Mitsui & Co.) is also growing in sales, although fewer retail stores or specialized shops handle the product. The sales point of the product is a higher plaque-removing performance achieved with ultrasound, and it mainly enjoy popular among consumers who dissatisfied with ordinary electric toothbrushes.

### C . Selling Prices

The retail price recommended by the producer for the different oral care products is not usually displayed at the storefront, as oral care products are in practice sold under an open pricing system<sup>4</sup>. The Retail price zone for each item and the major products are shown in Table 4.

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<sup>4</sup> A system where distributors set retail prices at their own discretion. Some companies in the household electric appliance industry, the camera industry, and the food industry introduced the system in 1993. Standard prices, which are shown under a fixed retail price system where manufacturers set wholesale and retail prices, are not displayed under an open pricing system. This is effective in preventing underselling and dual price displays, but on the other hand, distributors and consumers need the ability to compare prices before buying.

Table 4 . Retail Price by Type of Products

Type of Product	Retail Price Zone	Name of Manufacturer	Name of Product
Toothbrushes	¥250 - 350	Lion	Denter Sytstema
		SmithKline Beecham	Aqua Fresh Twist Cross
		Sunstar	GUM
		Johnson & Johnson	Reach Megabite
		Kao	Clear Clean Powerful Head
	¥100 – 200	Sunstar	Do Clear W
Kao		Check	
Lion		Between	
Toothpaste	¥900 – 1,500	Sangi	Apa Guard
		Sunstar	AP White
		Lion	Crysta
	¥250 – 350	Kao	Tsubu Shio
		Sunstar	GUM
		SmithKline Beecham	Aqua Fresh Whitening
		Lion	White & White Prime
		Lion	PC Clinica
	¥100 – 200	SmithKline Beecham	Aqua Fresh
		Kao	Clear Clean
		Lion	Dentar T
		Lion	White & White
Mouthwash	¥500 – 1,000	Sunstar	GUM Dental Rinse 960ml
		Lion	Xylident 600ml
		Earth Chemical	Mondamine 700ml
		Warner Lambert	Listerine 1,000ml
Devices for Proximal Cleansing	¥300 - 400	Sunstar	GUM Floss
		Kobayashi Pharmaceutical	Ito Yoji
		Johnson & Johnson	Dental Floss 32m
		Lion	PC Clinica Double Floss 20P
		Jacks	Dental Pro Interdental Brush 10P
Denture-Related Products	¥700 – 1,000	Earth Chemical	Poligrip
		Kobayashi Pharmaceutical	Toughgrip
	¥900 – 1,200	Earth Chemical	Polident 108P
		Kobayashi Pharmaceutical	Toughdent 120P
		Kobayashi Pharmaceutical	Partial Dent 108P
Electric Toothbrushes	¥10,000 – 17,000	Earth Chemical	Polident for Partial Dentures 72P
		Mitsui & Co.	Sonicare Solo
		Toray Ireeve	Ultima
		Matsushita Electric Works	Speed Swing
	¥2,500 – 3,500	Braun	Oral-B 3D Excell Delux Type
		Sunstar	Gum Electric Toothbrush
	¥400 - 500	Braun	Oral-B Plak Control
		Minimum	Hapica Poy

## **D . Future Forecasts**

### **1 . Increased Consumer Interests**

According to the “Household Research Annual Report” prepared by the Ministry of Public Management, Home Affairs, Posts and Telecommunications, one person consumes 3.7 toothbrushes per year. So manufacturers recommend that consumers replace their toothbrush every month before cleaning ability deteriorates. The necessity of preventing tooth loss and periodontal diseases is emphasized by the Ministry of Health, Labor and Welfare in the “8020 Campaign”, which aims at encouraging people to retain at least 20 of their own teeth up to the age of 80. The Japan Dentifrice Manufactures Association and related manufacturers also conduct educational activities, and the government launched a ten-year health program called “Healthy Japan 21” in 2000. Subsequently, as consumers’ interest in health and hygiene increases, so does their interest in oral care. It also leads to the diversification and development of products that are more oriented to individual consumer preferences. This is expected to create new demand and become the driving force in a market that has been stagnant for the last few years.

Consumers who want lower-priced products are increasing: the numbers using expensive value-added products is also increasing. This polarization of the price structure is expected to continue.

### **2 . Aged of Society**

It is said that there are 20 million denture users in Japan, of which 5 million are using full dentures and 15 million have partial dentures. The diffusion rate for denture-related products, however, is still at a low level of 30% according to an industry source. the percentage of aged population increase, the market for denture-related products, including denture adhesives cleansers, brushes and paste, is expected to continue to show steady growth.

## **V . Advice for Market Access**

### **A . Development of Products Suited to Japanese Tastes**

It is important to develop products that fit the tastes of Japanese consumers and that are likely to be accepted by them. For example, Japanese people tend to prefer toothpaste with a mild minty taste, and choose toothbrushes with a compact head because of their tooth shape and the skeletal structure of their jaws. Products with no these factors, have little chance of breaking into the market.

### **B . Securing a Distribution Channel**

Foreign manufacturers that want to sell products in the Japanese market must first of all understand the distribution system. Wholesaler and products handled vary greatly depending on where products are to be finally sold.

Mail order catalogues are one retail that is easier for more expensive foreign products to access. Sundry goods stores or specialized stores are suitable for general products. These companies in the mail order catalogue sector look for products that are unlikely to face competition from mass retailers or drugstores. They often accept foreign products without any adjustments to the specifications as long as they meet Japanese standards. One good way of researching the Japanese market is to approach a wholesaler who has channels to these retailers. A foreign manufacturer that succeeds in joining a distribution route with a constant flow of products may be able to gradually expand their sales channel into larger distribution networks.

### **C . Exploiting New Markets**

Among the market for products already established in Japan, the large manufacturers dominate. However, products whose concepts give a fresh image to Japanese market, can break into the market and enable the producer to build up a reputation. Of course, it is comparatively easy for a product on which there is a patent, or one that is produced with a technology other producers cannot use, to get into the Japanese market. And it is probably the best way to compete with Japanese toiletry manufacturers who pursue small profit and quick-returns strategies.

## **D . Denture-Related Products**

It is difficult to have elderly people consumers—they are main customers-change the brands of products. However, It is one good strategy for overseas manufactures to research the behavior of age groups who will become the main users of these products in 10 to 15 years time is worthwhile.

The market for partial denture-related products whose major customers are around the age of 50 is relatively new, but it is useful for overseas manufacturers to venture into this market in order to secure future users.

## **E . Understanding of Laws and Regulations**

Most oral care products are quasi-drugs, and it is essential to understand the Japanese laws and regulations regarding them, including the Pharmaceutical Affairs Law. Regulations are regarded as being stricter than in Europe and the U.S. Also, product information must be displayed in words that can be easily read and understood by users, and information that could cause misunderstandings on the efficacy and effects of the drugs must not be given.

Being aware of items that have moved from the drug category to the quasi-drug category, deregulation for applications and examinations of quasi-drugs, are also important.

## VI . Reference

### A . Related Ministries and Agencies

Name	Address	TEL / URL
The Pharmaceutical Affairs Law Pharmaceutical and Food Safety Bureau, Ministry of Health, Labour and Welfare	1-2-2 Kasumigaseki, Chiyoda-ku, Tokyo 100-8916	Tel: 03-5253-1111 <a href="http://www.mhlw.go.jp">http://www.mhlw.go.jp</a>
Household Goods Quality Labeling Law Section on Consumption and Economic Measures, Consumption and Economy Department, Commerce and Information Policy Bureau, Ministry of Economy, Trade and Industry	1-3-1 Kasumigaseki, Chiyoda -ku, Tokyo 100-8901	Tel: 03-3501-1511 <a href="http://www.meti.go.jp">http://www.meti.go.jp</a>
Electrical Appliance and Material Safety Law Section on Electric Technology, Public Service Department, Agency of Natural Resources and Energy	1-3-1 Kasumigaseki, Chiyoda-ku, Tokyo 100-8901	Tel: 03-3501-1511 <a href="http://www.enecho.meti.go.jp">http://www.enecho.meti.go.jp</a>

### B . Related Organizations

Name	Address	TEL /FAX /URL
The Japan Cooperative of the Brush Industry (located in the Industrial Technology Support Center in Higashi Osaka)	1-5-3 Takai Tanaka, Higashi Osaka-Shi, Osaka-fu 577-0065	Tel: 06-6787-6162 Fax: 06-6787-6163
Japan Dentifrice Manufactures Association (JDMA)	2-4 Kodenma-cho, Nihonbashi, Chuo-ku, Tokyo 103-0001	Tel: 03-3249-2511 Fax: 03-3249-2513 <a href="http://www.hamigaki.gr.jp/">http://www.hamigaki.gr.jp/</a> (Japanese only)

### C . Domestic Producers

Company Name	Address	TEL / FAX / URL	Manufacturers of Major Dealing Products
Block Drug Japan	Sanko Bldg. 5-1-24 Isogami-dori, Chuo-ku, Kobe-shi, Hyogo 651-0086	Tel: 078-241-1210 Fax: 078-241-2505	Denture-Related Products
Braun Gillette Japan Inc.	89-1 Yamashita-cho, Naka-ku, Yokohama-shi, Kanagawa 231-0023	Tel: 045-681-7591 Fax: 045-681-7045 <a href="http://www.braun.co.jp/">http://www.braun.co.jp/</a>	Electric Toothbrushes

Earth Chemical	MD Kanda Bldg. 9-1 Mitoshiro-cho, Kanda, Chiyoda-ku, Tokyo 101-0053	Tel: 03-3294-2851 <a href="http://www.earth-chem.co.jp/">http://www.earth-chem.co.jp/</a> (Japanese only)	Toothpaste, Mouthwash, Denture-Related Products
Fukuba Dental Corporation	914-1 Nazukari, Nagareyama-shi, Chiba 270-0145	Tel: 0471-43-0870 Fax: 0471-43-0876 <a href="http://www.ionic.co.jp/">http://www.ionic.co.jp/</a> (Japanese only)	Toothbrushes, Devices for Proximal Cleansing
Glaxo SmithKline	GSK Bldg. 4-6-15 Sendagaya, Shibuya-ku, Tokyo 151-8566	Tel: 03-5786-5000 Fax: 03-5786-5200 <a href="http://www.glaxosmithkline.co.jp/cgi-bin/press/index.cgi">http://www.glaxosmithkline.co.jp/cgi-bin/press/index.cgi</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash
Hanix Co.,Ltd.	1-6-10 Okudo, Katsushika-ku, Tokyo 124-0022	Tel: 03-3697-3068 Fax: 03-3697-7568 <a href="http://www.hanix.co.jp/">http://www.hanix.co.jp/</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash
Health Tech	1-14-13 Kanda Nishiki-cho, Chiyoda-ku, Tokyo 101-0054	Tel: 03-3219-1818 Fax: 03-3219-1810 <a href="http://www.healthtech.co.jp/">http://www.healthtech.co.jp/</a> (Japanese only)	Toothbrushes, Devices for Proximal Cleansing
Jacks	4-10-6 Ginza, Chuo-ku, Tokyo 104-0061	Tel: 03-3546-1223 Fax: 03-3546-3565 <a href="http://www.jacks.co.jp/index2.html">http://www.jacks.co.jp/index2.html</a> (Japanese only)	Devices for Proximal Cleansing
Johnson & Johnson	East 21 Tower 6-3-2 Toyo, Koto-ku, Tokyo 135-0016	Tel: 03-5632-7200 <a href="http://www.jnj.co.jp/">http://www.jnj.co.jp/</a> (Japanese only)	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash
Kao Corporation	1-14-10 Nihonbashi-Kayabacho, Chuo-ku, Tokyo 103-8210	Tel: 03-3660-7111 <a href="http://www.kao.co.jp/">http://www.kao.co.jp/</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash
Kobayashi Pharmaceutical	4-3-6 Doshomachi, Chuo-ku, Osaka-fu 541-0045	Tel: 06-6222-0897 Fax: 06-6222-0643 <a href="http://www.kobayashi.co.jp/">http://www.kobayashi.co.jp/</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash, Denture-Related Products/ Electric Toothbrushes
Lion Corporation	1-3-7 Honjo, Sumida -ku, Tokyo 130-8644	Tel: 03-3621-6211 <a href="http://www.lion.co.jp/">http://www.lion.co.jp/</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash
Sunstar Inc.	3-1 Asahi-machi, Takatsuki-shi, Osaka-fu 569-1195	Tel: 0726-82-5541 Fax: 0726-82-8162 <a href="http://www.sunstar.com/">http://www.sunstar.com/</a>	Toothbrushes, Devices for Proximal Cleansing, Toothpaste, Mouthwash/Electric Toothbrushes
Zettoc Nippon Co.,Ltd.	2-3-26 Kudan Minami, Chiyoda-ku, Tokyo 102-0074	Tel: 03-5275-6881 Fax: 03-5275-6884 <a href="http://www.zettoc.co.jp/">http://www.zettoc.co.jp/</a> (Japanese only)	Toothpaste, Mouthwash



## D . Wholesalers

Company Name	Address	TEL / FAX / URL	Items handled
Chuo Bussan Corporation	2-2-3 Minami Aoyama, Minato-ku, Tokyo 107-8545	Tel: 03-3796-5075 Fax:03-3402-6871 <a href="http://www.chuo-bussan.co.jp/menu.html">http://www.chuo-bussan.co.jp/menu.html</a> (Japanese only)	cosmetics, detergents, cosmetics-related sundry goods, sanitary goods
Daika Corporation	Higashi 3-1 Kita 6-jo, Higashi-ku, Sapporo-shi, Hokkaido 060-0906	Tel: 011-742-4111 Fax: 011-721-2985 <a href="http://www.daika.co.jp/">http://www.daika.co.jp/</a> (Japanese only)	cosmetics-related sundry goods, detergents, sanitary goods
Ida Ryogokudo Co.,Ltd.	Sumitomo Ichigaya Bldg. 1-1 Honmura-cho, Ichigaya, Shinjuku-ku, Tokyo 162-0845	Tel: 03-3235-0701 <a href="http://www.idaryogokudo.co.jp/">http://www.idaryogokudo.co.jp/</a>	cosmetics, cosmetics-related sundry goods, sanitary goods, daily necessities
Itoi Corporation	1-21-10 Osu, Naka-ku, Nagoya-shi, Aichi 460-011	Tel: 052-221-1211 <a href="http://www.itoigrp.co.jp/index2.htm">http://www.itoigrp.co.jp/index2.htm</a> (Japanese only)	cosmetics-related sundry goods, detergents, sanitary goods
Kawataki Corporation	Higashi Serikawa-cho 33 Shimotoba, Fushimi-ku, Kyoto-shi, Kyoto-fu 612-8395	Tel: 075-601-8141 Fax: 075-601-1989 <a href="http://www.kawataki.co.jp/">http://www.kawataki.co.jp/</a>	general daily household necessities
Marufuji Co.,Ltd.	4-2-1, Kusugaoka-cho, Nada-ku, Kobe-shi, Hyogo 657-0024	Tel: 078-821-3001 Fax: 078-841-8952 <a href="http://www.marufuji.co.jp/">http://www.marufuji.co.jp/</a> (Japanese only)	general daily household necessities
Marumi Kogei	2-banchi, Kanda Nishi Fukuda-cho, Chiyoda-ku, Tokyo 101-0037	Tel: 03-3252-5281	general daily household necessities
Nomura Shoji	1-1389 Kaijin-cho Minami, Funabashi-shi Chiba 273-0024	Tel: 047-434-6671	detergents, cosmetics-related sundry goods, sanitary goods
Ohyama	3-9-3 Higashi Nihonbashi, Chuo-ku, Tokyo 103-8466	Tel: 03-3662-0231 <a href="http://www.beauty-net.co.jp/">http://www.beauty-net.co.jp/</a> Company (Japanese only)	cosmetics, cosmetics-related sundry goods, detergents, sanitary goods
Paltac Co.,Ltd.	1-5-9 Minami Kyuhoji-machi, Chuo-ku, Osaka-shi, Osaka-fu 541-0058	Tel: 06-6262-1286 Fax: 06-6264-6343 <a href="http://www.paltac.co.jp/">http://www.paltac.co.jp/</a>	detergents, cosmetics, cosmetics-related sundry goods, sanitary goods
Sunvic Co.,Ltd.	7-12 Komondo-cho, Hakata-ku, Fukuoka-shi, Fukuoka 812-0029	Tel: 092-281-1021 <a href="http://www.sunvic.co.jp/">http://www.sunvic.co.jp/</a> (Japanese only)	cosmetics, detergents, sanitary goods
Tokyo-Do	4-16-9 Tachikawa, Sumida-ku, Tokyo 130-0023	Tel: 03-3632-6181 <a href="http://www.tokyo-do.co.jp/">http://www.tokyo-do.co.jp/</a> (Japanese only)	detergents, cosmetics-related sundry goods, sanitary goods
Yosiyasu	2-1-15 Iwamoto-cho, Chiyoda-ku, Tokyo 101-0032	Tel: 03-5687-5111 <a href="http://www.yosiyasu.co.jp/profile/">http://www.yosiyasu.co.jp/profile/</a> (Japanese only)	general daily household necessities

## **E . Trade Fairs, etc.**

Drugstore 2001

Frequency: once every year

Period: September 2001

Name of venue: Tokyo Big Site (Tokyo International Exhibition Center) (Tokyo)

Sponsor: The Japan Health Industry News Co., Ltd.

8F, Kanda Horii Bldg., 2-3-3, Kaji-cho, Chiyoda-ku, Tokyo 101-0044

Tel: 03-5296-1011 Fax: 03-5296-1010

<http://www.health-industry-news.co.jp/>

JAPAN Drugstore Show 2002

Frequency: once every year (plan)

Period: February 2002

Name of venue: Makuhari Messe (Japan Convention Center) (Chiba)

Sponsor: Japan Association of Chain Drugstores

4F, Kaede Daini Bldg., 2-5-10, Shinyokohama, Kohoku-ku, Yokoyama-shi, Kanagawa  
222-0033

Tel: 045-474-1311 Fax: 045-474-2569

<http://www.jacds.gr.jp>