



Euromonitor
International

Health and Wellness in Japan

August 2024

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EXECUTIVE SUMMARY

- Health and wellness in focus
- Consumer weight trends
- Consumer diet trends
- Health-related deaths
- Blood pressure and cholesterol levels
- Diabetes prevalence

DISCLAIMER

HW Hot Drinks in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Consumers’ needs are becoming more diverse, which is reflected in health and wellness hot drinks
- Organic accounts for the highest sales within health and wellness hot drinks, as consumers consider these less harmful than standard products
- No allergens hot drinks boosted by consumers being more careful with their diet

PROSPECTS AND OPPORTUNITIES

- No sugar hot drinks set to see growth as health concerns rise amongst consumers
- No caffeine set to grow as more consumers look to improve their sleep quality
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HW Soft Drinks in Japan

KEY DATA FINDINGS

2023 DEVELOPMENTS

- An increasing number of players offer products with more than one health claim, offering value for money and convenience
- No sugar leads sales within health and wellness soft drinks in 2023, as the dangers of overconsumption of sugar are well-known
- Natural is a growing claim in health and wellness soft drinks due to consumers’ health awareness and new launches

PROSPECTS AND OPPORTUNITIES

- FFC focusing on mental health, healthy ageing, and more niche health claims are expected to continue to grow
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HW Snacks in Japan

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Health and wellness products seen by players as a way to add value

With demand for fortified products, good source of minerals sees high sales in 2023

Concerns about health implications of high sugar consumption drive high growth for the no sugar claim

PROSPECTS AND OPPORTUNITIES

Consumers' desire for a strong metabolism will drive high protein to be a dynamic claim in health and wellness snacks

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Low fat is significant within dairy products and alternatives due to health concerns, although taste also remains important

Added benefits necessary to compete with other healthy foods and drinks

PROSPECTS AND OPPORTUNITIES

Increasing consumer awareness of plant-based milks other than soy, especially those with secondary claims

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Japanese consumers value MCT oil for its Foods with Function Claims

The desire for a strong metabolism drives up sales of high protein products within health and wellness cooking ingredients and meals in 2023

PROSPECTS AND OPPORTUNITIES

Increasing production costs and declining population to accelerate entry of players in health and wellness cooking ingredients and meals, including plant-based

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KEY DATA FINDINGS

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Growth in high fibre staple foods is driven by a raft of new product launches

Probiotic benefits from consumers' desire to look after their metabolism in 2023

PROSPECTS AND OPPORTUNITIES

Potential for health-orientated developments likely to be constrained by consumers' price sensitivity

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