

Japan Nutraceuticals Market Assessment, By Type [Dietary Supplements, Functional Foods, Functional Beverages, Others], By Form [Tablets, Capsules, Powder, Liquid, Others], By Source [Animal, Plant, Microbial], By Application [Health Benefits, Personal Care, Sports, Energy and Weight Management, Others], By Distribution Channel [Specialty Stores, Pharmacies, Online Retail Stores, Hypermarkets/Supermarkets, Convenience Stores], By Region, Opportunities, and Forecast, FY2017-FY2031F

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Abstracts

The Japan Nutraceuticals Market was estimated at USD 13.65 billion in FY2023 and is anticipated to reach to USD 28.80 billion by FY2031 witnessing a CAGR of 9.78% during the forecast period FY2024-2031. There is little doubt that the Japanese market should be regarded as one of the 'up-and-coming' markets for nutraceutical ingredients and functional foods, even though the term 'nutraceutical' is not commonly used in Japan and is not familiar to the majority of Japanese consumers.

With a focus on relatively small servings of seasonal fruits and vegetables, as well as fish and shellfish, and rice as the main food, the traditional Japanese diet has been regarded as being highly nutritious. In the past, people consumed relatively little fat, largely from plant sources rather than animals. However, not all Japanese had access to the entire traditional cuisine on a daily basis, and food-related health problems were not unusual. Many people, especially women, were and still are concerned about their calcium and iron intake. The high incidence of stomach cancer in Japan was thought to

be mostly due to the frequent eating of pickled and salted foods in the traditional diet.

Several traditional Japanese dietary ingredients have lately been found to provide additional health advantages beyond only providing nutrients. For instance, common dietary supplements include 'beni koji' (red yeast) foods for lowering cholesterol, konnyaku non-caloric fibre for weight loss, and green tea catechins for their anti-caries and anti-cancer properties. The recent success of these traditional ingredients on the market has encouraged Japanese (and foreign) businesses to look more into the possible health advantages of other traditional culinary ingredients.

Increased Spending on Technical Innovations

Demand for these products increases as a result of rising costs for their technological advancements. Over-the-counter drug abuse has a negative impact on consumer lifestyle. Functional foods and beverages have solved this issue to great effect. The idea of functional food was developed in Japan in the 1980s and was given government approval to help the country's citizens' overall health. Functional foods are the most popular product category consumed by the public because they have benefits to health beyond supplying nutrients. They could lessen the chance of developing chronic illnesses and boost general health. Muesli is one of the most prevalent modern examples, as its soluble fibre decreases blood cholesterol levels. Diets can easily include whole grains, veggies, legumes, nuts, and fruits. They are unable to change consumers' unhealthy eating habits, though.

Antioxidants included in fruits and vegetables help to fight against disease. Modified functional foods are also available that have been supplemented with probiotics, fibre, vitamins, or minerals to improve their nutritional value. Fortified cereals, fortified grains, fortified bread and pasta, and other fortified foods are examples of modified functional foods. In June 2021, a new patented process was developed by TCI Japan's Science of Probiotics, which uses high-efficiency fermentation technology to put 100 billion live probiotics—roughly equal to the number of probiotics in ten bottles of typical lactic acid bacteria drinks—into each tiny glass bottle of drink. Modern technology can also be used to keep the drinks' live bacterial populations at high levels.

Growing Dependence on Supermarkets and Hypermarkets

Supermarkets and hypermarkets have recently gained significance in busy consumers' lifestyles because consumers tend to buy all of their monthly necessities from there. As

opposed to visiting various stores, everything is offered under one roof, saving time. Due to the consumers' fascination with the packaging and display format, supermarkets are crucial in encouraging excessive shopping. They often display informational materials, product descriptions, and nutritional details, helping customers understand the benefits and usage of various nutraceutical products. This education fosters consumer awareness and encourages them to make informed choices. Additionally, discounts at supermarkets are drawing customers in even more. By carefully reading the labels and contrasting the pricing of similar products, the buyer can choose from a variety of alternatives. Overall, the presence of nutraceuticals in supermarkets and hypermarkets in Japan not only provides convenient access for consumers but also facilitates product awareness, education, and promotion.

Government Regulations

In Japan, the term 'nutraceuticals' is not commonly used. Instead, these products are typically classified as 'foods for specified health uses' (FOSHU) or 'foods with nutrient function claims' (FNFC). FOSHU and FNFC are categories created by the Japanese government to regulate functional foods and health claims. Manufacturers of FOSHU products must submit an application to the Consumer Affairs Agency (CAA) for approval. The application should include scientific evidence supporting the claimed health benefits and safety of the product. The CAA evaluates the application and grants approval if the product meets the necessary requirements. FOSHU products are permitted to make specific health claims, provided they have been approved by the CAA.

FNFC products, on the other hand, can make nutrient function claims without going through the same rigorous approval process as FOSHU. Nutraceutical products in Japan must comply with safety standards set by the Ministry of Health, Labour and Welfare (MHLW). Certain ingredients may be restricted or require special approval. Manufacturers are responsible for ensuring the safety of their products and conducting appropriate testing. Proper labelling is essential for nutraceutical products. Labels should clearly state the product's category (FOSHU or FNFC), specific health claims (if applicable), and instructions for use. It is important to comply with the guidelines provided by the MHLW regarding labelling regulations.

Popularity of Western Ingredients

Western ingredients often bring a sense of novelty and exoticism to the Japanese market. Consumers are intrigued by ingredients that are not traditionally found in

Japanese cuisine or culture. The introduction of Western ingredients in nutraceuticals provides a unique selling proposition and attracts consumers looking for something different and innovative. Western ingredients, such as specific herbs, botanicals, or superfoods, are often associated with various health benefits. They may offer antioxidant properties, immune system support, anti-inflammatory effects, or other wellness benefits. The inclusion of these Western ingredients in nutraceutical products expands the range of health benefits available to consumers, thereby driving demand. Japan has a rich history of cultural exchange with the West. The inclusion of Western ingredients in nutraceuticals reflects this cross-cultural appeal.

Japanese consumers are often receptive to products that blend traditional Japanese ingredients with Western ones, as it combines familiar elements with new flavours and health benefits. International nutraceutical brands and manufacturers often incorporate Western ingredients into their product formulations. The presence of these global brands in the Japanese market helps introduce and popularize Western ingredients among Japanese consumers. The trust and reputation associated with these brands contribute to driving the demand for nutraceuticals containing Western ingredients. Lutein, glucosamine, and Coenzyme Q10 sales are moving up the list of top sellers. For instance, Coenzyme Q 10 is becoming increasingly popular in Japan. According to Health Industry News (Tokyo), the industry has been increasing at a rapid rate for continuous years. Lutein is now a big market, but a few years ago, the majority of customers had never ever heard of it. Future Japan will undoubtedly be influenced by the West more.

Aging Population

Japan is known to have one of the most rapidly aging populations in the world. This demographic shift is primarily a result of low birth rates and a high life expectancy. Factors such as increased access to healthcare, advancements in medical technology, and improvements in living standards have contributed to longer lifespans. As people age, there is an increased focus on health maintenance and disease prevention. Older adults often seek ways to support their overall well-being and manage age-related health concerns. Nutraceuticals offer a convenient and accessible option for older individuals to supplement their diets with functional foods and dietary supplements that are specifically formulated to address their health needs. With advancing age, individuals may experience specific health issues such as joint health, cognitive decline, cardiovascular health, and immune system support. Older adults may face challenges in meeting their nutritional needs due to factors such as reduced appetite, diminished nutrient absorption, and dietary restrictions. Age-related conditions such as

osteoporosis and joint discomfort are prevalent there among the aging population. Nutraceuticals that promote vitality, energy, and overall well-being are found attractive to this demographic. Products targeting energy support, stress management, and overall wellness are marketed to older adults seeking to enhance their quality of life and remain active as they age. For instance, in October 2021, to help older individuals' memory abilities, Morinaga Milk Industry has introduced a new line of functional foods that contain its probiotic strain that has been professionally examined.

Impact of COVID-19

The COVID-19 pandemic has had a conflicting effect on the overall nutraceutical market. Demand for nutraceutical products increased as a result of increased health awareness and rising demand for immunity-boosting supplements. Although the absence of transportation and the limited supply chain had an influence on quarterly growth in 2020, many companies in the country altered their business hours and shortened them to enable employees to replenish goods and clean stores overnight. These elements hindered the market's growth for functional foods and beverages. In order to boost people's health and immunity, the demand for nutritional supplements and functional foods soared throughout the pandemic. There has been a shift in consumer behaviour towards purchasing supplements that increase immunity, lowering the likelihood of contracting an infection. Following the pandemic, preventative health measures have become more popular and demand for them is only growing. These have become a necessary component of consumers' life as a result of the effects of the pandemic all over the world.

Key Players Landscape and Outlook

The nutraceutical market in Japan is highly competitive and includes several key players. Some notable companies operating in the Japanese nutraceutical market are Otsuka Pharmaceutical Co., Ltd., Taisho Pharmaceutical Holdings Co., Ltd. and Lion Group. Companies will likely continue to invest in research, product diversification, marketing, and partnerships to meet the evolving needs of Japanese consumers and capitalize on the growing nutraceutical market.

In April 2023, Kirin introduced its first Food with Function Claims (FFC) nutrition sports drink in response to the rising demand for dietary beverages. Kirin Plasma Sports, their new product, is strengthened with LC-Plasma to increase immune system function.

Contents

1. RESEARCH METHODOLOGY

2. PROJECT SCOPE & DEFINITIONS

3. IMPACT OF COVID-19 ON JAPAN NUTRACEUTICALS MARKET

4. EXECUTIVE SUMMARY

5. VOICE OF CUSTOMER

5.1. Demographics (Age/Cohort Analysis – Baby Boomers and Gen X, Millennials, Gen Z; Gender; Income – Low, Mid and High; Geography; Nationality; etc.)

5.2. Market Awareness and Product Information

5.3. Brand Awareness and Loyalty

5.4. Factors Considered in Purchase Decision

5.4.1. Brand Name

5.4.2. Pack Size

5.4.3. Price

5.4.4. Customisation Options

5.4.5. Packaging Type

5.4.6. Inclination Towards Organic Products

5.4.7. Promotional Offers & Discounts

5.5. Purpose of Purchase (Personal Use, Gifting)

5.6. Frequency of Purchase

5.7. Medium of Purchase

5.8. Role of Brand Ambassador or Influencer Marketing on Product/Brand Absorption

6. JAPAN NUTRACEUTICALS MARKET OUTLOOK, FY2017-FY2031F

6.1. Market Size & Forecast

6.1.1. By Value

6.1.2. By Volume

6.2. By Type

6.2.1. Dietary Supplements

6.2.1.1. Vitamins & Minerals

6.2.1.2. Proteins and Amino Acids

6.2.1.3. Probiotics

- 6.2.1.4. Fatty Acids
- 6.2.1.5. Others
- 6.2.2. Functional Foods
 - 6.2.2.1. Bakery & Confectionery
 - 6.2.2.2. Cereals
 - 6.2.2.3. Dairy
 - 6.2.2.4. Snacks
 - 6.2.2.5. Others
- 6.2.3. Functional Beverages
 - 6.2.3.1. Energy Drinks
 - 6.2.3.2. Sports Drinks
 - 6.2.3.3. Others
- 6.2.4. Others
- 6.3. By Form
 - 6.3.1. Tablets
 - 6.3.2. Capsules
 - 6.3.3. Powder
 - 6.3.4. Liquid
 - 6.3.5. Others
- 6.4. By Source
 - 6.4.1. Animal
 - 6.4.2. Plant
 - 6.4.3. Microbial
- 6.5. By Application
 - 6.5.1. Health Benefits
 - 6.5.2. Personal Care
 - 6.5.3. Sports, Energy and Weight Management
 - 6.5.4. Others
- 6.6. By Distribution Channel
 - 6.6.1. Specialty Stores
 - 6.6.2. Pharmacies
 - 6.6.3. Online Retail Stores
 - 6.6.4. Hypermarkets/Supermarkets
 - 6.6.5. Convenience Stores
- 6.7. By Region
 - 6.7.1. North
 - 6.7.2. East
 - 6.7.3. West & Central
 - 6.7.4. South

7. MARKET MAPPING, FY2023

- 7.1. By Type
- 7.2. By Form
- 7.3. By Source
- 7.4. By Application
- 7.5. By Distribution Channel
- 7.6. By Region

8. MACRO ENVIRONMENT AND INDUSTRY STRUCTURE

- 8.1. Supply Demand Analysis
- 8.2. Import Export Analysis
- 8.3. Value Chain Analysis
- 8.4. PESTEL Analysis
 - 8.4.1. Political Factors
 - 8.4.2. Economic System
 - 8.4.3. Social Implications
 - 8.4.4. Technological Advancements
 - 8.4.5. Environmental Impacts
 - 8.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 8.5. Porter's Five Forces Analysis
 - 8.5.1. Supplier Power
 - 8.5.2. Buyer Power
 - 8.5.3. Substitution Threat
 - 8.5.4. Threat from New Entrant
 - 8.5.5. Competitive Rivalry

9. MARKET DYNAMICS

- 9.1. Growth Drivers
- 9.2. Growth Inhibitors (Challenges and Restraints)

10. REGULATORY FRAMEWORK AND INNOVATION

- 10.1. Clinical Trials
- 10.2. Patent Landscape
- 10.3. FDA Approvals

10.4. Innovations/Emerging Technologies

11. KEY PLAYERS LANDSCAPE

- 11.1. Competition Matrix of Top Five Market Leaders
- 11.2. Market Revenue Analysis of Top Five Market Leaders (in %, FY2023)
- 11.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
- 11.4. SWOT Analysis (For Five Market Players)
- 11.5. Patent Analysis (If Applicable)

12. PRICING ANALYSIS

13. CASE STUDIES

14. KEY PLAYERS OUTLOOK

- 14.1. Yakult Honsha Co., Ltd.
 - 14.1.1. Company Details
 - 14.1.2. Key Management Personnel
 - 14.1.3. Products & Services
 - 14.1.4. Financials (As reported)
 - 14.1.5. Key Market Focus & Geographical Presence
 - 14.1.6. Recent Developments
- 14.2. Otsuka Pharmaceutical Co., Ltd.
- 14.3. Taisho Pharmaceutical Holdings Co., Ltd.
- 14.4. Lion Group
- 14.5. Ajinomoto Co., Inc.
- 14.6. Meiji Holdings Co., Ltd.
- 14.7. Suntory Group
- 14.8. Kikkoman Corporation
- 14.9. Morinaga Milk Industry Co., Ltd.
- 14.10. House Foods Group

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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