

# Consumer Health in Japan

September 2024

**Table of Contents** 

## Consumer Health in Japan

#### **EXECUTIVE SUMMARY**

Consumer health in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for consumer health?

#### MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2019-2024

Table 2 - Life Expectancy at Birth 2019-2024

#### MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2019-2024

Table 4 - Sales of Consumer Health by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Consumer Health: % Value 2020-2024

Table 6 - LBN Brand Shares of Consumer Health: % Value 2021-2024

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2019-2024

Table 8 - Distribution of Consumer Health by Format: % Value 2019-2024

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2024

Table 10 - Forecast Sales of Consumer Health by Category: Value 2024-2029

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2024-2029

#### **APPENDIX**

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

## **DISCLAIMER**

## **DEFINITIONS**

#### **SOURCES**

Summary 1 - Research Sources

# Analgesics in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Systemic analgesics sees a continued value growth trend due to persistent infections

New products emerge in adult acetaminophen, in which OTC medication choices were limited

Growth trend in topical analgesics/anaesthetic continues, supported by domestic and inbound demand

#### PROSPECTS AND OPPORTUNITIES

Diverse factors set to drive growth in analgesics

Stocking of topical analgesics/anaesthetic to ensure disaster preparedness

Encouraging a move to OTC medications as a fiscal measure

#### **CATEGORY DATA**

Table 12 - Sales of Analgesics by Category: Value 2019-2024

Table 13 - Sales of Analgesics by Category: % Value Growth 2019-2024

Table 14 - NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 - LBN Brand Shares of Analgesics: % Value 2021-2024

Table 16 - Forecast Sales of Analgesics by Category: Value 2024-2029

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

## Sleep Aids in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Many sleep-deprived consumers in Japan are not turning to sleep aids The potential for enlightenment about the importance of sleep Safety over efficacy can help reassure consumers

## PROSPECTS AND OPPORTUNITIES

Value stagnation expected in the forecast period

Promoting sleep as a positive lifestyle change in brand campaigns

From competitors to collaborators

#### CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2019-2024

Table 19 - Sales of Sleep Aids: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Sleep Aids: % Value 2020-2024

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2021-2024

Table 22 - Forecast Sales of Sleep Aids: Value 2024-2029

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2024-2029

## Cough, Cold and Allergy (Hay Fever) Remedies in Japan

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Sales maintain slow growth, due to high infection rate but low pollen count Price adjustments for OTC medicines

Overdose becomes a social issue

## PROSPECTS AND OPPORTUNITIES

Continued stability ahead

From seasonal hay fever prevention to year-round allergy prevention

Self-medication as a growth driver

## **CATEGORY DATA**

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

# Dermatologicals in Japan

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Sales see negligible growth overall, with variations across categories "Strong" steroids enter the OTC space

#### Expansion of the femcare concept

#### PROSPECTS AND OPPORTUNITIES

Upcoming positive and negative factors for dermatologicals

Active development of dermatologicals by private label

Marketing strategies for products which are embarrassing to buy in-store

#### **CATEGORY DATA**

Table 30 - Sales of Dermatologicals by Category: Value 2019-2024

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2019-2024

Table 32 - NBO Company Shares of Dermatologicals: % Value 2020-2024

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2021-2024

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2021-2024

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2024-2029

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

# Digestive Remedies in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Digestive remedies maintains its growth trend, continuing its rebound from the pandemic

Price revision for the leading player in diarrhoeal remedies

Motion sickness remedies sees family-oriented promotions

## PROSPECTS AND OPPORTUNITIES

Various factors expected to drive a slowdown in growth

Increase in retailers' private label lines and channels set to intensify the competition

Potential for new cases of motion sickness from emerging technologies

# **CATEGORY DATA**

Table 37 - Sales of Digestive Remedies by Category: Value 2019-2024

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2020-2024

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

# Eye Care in Japan

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Eye care struggles to achieve growth in 2024 due to low pollen symptoms

Targeting all generations, one by one

Growth of all-in-one products

#### PROSPECTS AND OPPORTUNITIES

Increase in eye problems, and alternative solutions

Change of class will lead to distribution changes

A move towards new forms of differentiation

#### **CATEGORY DATA**

Table 43 - Sales of Eye Care by Category: Value 2019-2024

Table 44 - Sales of Eye Care by Category: % Value Growth 2019-2024

Table 45 - NBO Company Shares of Eye Care: % Value 2020-2024

Table 46 - LBN Brand Shares of Eye Care: % Value 2021-2024

Table 47 - Forecast Sales of Eye Care by Category: Value 2024-2029

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

## NRT Smoking Cessation Aids in Japan

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Slow and steady decline is maintained in 2024 Switch to heated tobacco impacts NRT smoking cessation aids Corporate incentives to quit smoking

#### PROSPECTS AND OPPORTUNITIES

Prospect of tobacco tax increase could provide a short-term boost Municipal actions to limit smoking may impact sales Diversification from cigarettes creates a mixed picture

#### **CATEGORY INDICATORS**

Table 49 - Number of Smokers by Gender 2019-2024

## **CATEGORY DATA**

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

## Wound Care in Japan

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Stability in wound care in value terms

Momentum for hydrocolloid wound care products

Strong impact of a simple but new idea

## PROSPECTS AND OPPORTUNITIES

Wound care expected to face diverse demands

Family-oriented and disaster prevention awareness-raising activities

Differentiation through anime collaborations and unique designs

#### **CATEGORY DATA**

Table 56 - Sales of Wound Care by Category: Value 2019-2024

Table 57 - Sales of Wound Care by Category: % Value Growth 2019-2024

Table 58 - NBO Company Shares of Wound Care: % Value 2020-2024

Table 59 - LBN Brand Shares of Wound Care: % Value 2021-2024

Table 60 - Forecast Sales of Wound Care by Category: Value 2024-2029

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

# Sports Nutrition in Japan

# KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

The growth of sports protein products continues

Sports protein products takes in health trends

Promotion using athletes and personalities

#### PROSPECTS AND OPPORTUNITIES

Fusion of sports nutrition and complete nutrition concepts

Approaching the older consumer group

Protein likely to increasingly be chosen over alcohol

## **CATEGORY DATA**

Table 62 - Sales of Sports Nutrition by Category: Value 2019-2024

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

## Dietary Supplements in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Dietary supplements sees positive and negative movements

Impact of "benikoji issue"

Kirin acquires Fancl to expand its areas of business

## PROSPECTS AND OPPORTUNITIES

Using dietary supplements to prevent illness and maintain health will attract attention

The rise of femtech

The expansion of private label

#### CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2019-2024

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2019-2024

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2020-2024

Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

# Vitamins in Japan

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Liposomal vitamin C gains popularity

Tonics recovers, but struggles to compete with energy drinks

Seasonality of vitamin C, which is more popular in the summer

## PROSPECTS AND OPPORTUNITIES

Vitamins expected to maintain a strong performance

How changes in vitamin standards and research findings could affect future demand

Competition with other categories

#### **CATEGORY DATA**

- Table 75 Sales of Vitamins by Category: Value 2019-2024
- Table 76 Sales of Vitamins by Category: % Value Growth 2019-2024
- Table 77 Sales of Multivitamins by Positioning: % Value 2019-2024
- Table 78 NBO Company Shares of Vitamins: % Value 2020-2024
- Table 79 LBN Brand Shares of Vitamins: % Value 2021-2024
- Table 80 Forecast Sales of Vitamins by Category: Value 2024-2029
- Table 81 Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

## Weight Management and Wellbeing in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Sales decline due to the impact of the red yeast rice issue Shift from dieting to emphasising overall health and nutrition

The trend of promoting nutritional balance over dieting

#### PROSPECTS AND OPPORTUNITIES

A return to growth in the forecast period, with a focus on preventive care

Diversification of "health"

Targeting different consumer groups in supplement nutrition drinks

#### **CATEGORY DATA**

- Table 82 Sales of Weight Management and Wellbeing by Category: Value 2019-2024
- Table 83 Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
- Table 84 NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
- Table 85 LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
- Table 86 Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
- Table 87 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

# Herbal/Traditional Products in Japan

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

The end of the pandemic impacts sales of herbal/traditional products

Utilising Kampo to reach a new customer base

Business opportunities in PFC balance

## PROSPECTS AND OPPORTUNITIES

Capturing the wellness trend

Strengthening communication to attract consumers

A more holistic approach could attract a wider audience

## **CATEGORY DATA**

- Table 88 Sales of Herbal/Traditional Products by Category: Value 2019-2024
- Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2019-2024
- Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024
- Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024
- Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2024-2029
- Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2024-2029

## Paediatric Consumer Health in Japan

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Outbreaks of common colds, influenza, and COVID-19 support sales Protein for children increasingly valued Dietary supplements for families

#### PROSPECTS AND OPPORTUNITIES

The impact of the low birth rate in Japan

Solutions to "modern malnutrition"

The continued development of paediatric medicines due to government intervention

## **CATEGORY DATA**

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2020-2024

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2021-2024

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-health-in-japan/report.