

## **Consumer Health in Japan**

Market Direction | 2022-10-13 | 112 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €2200.00
- Multiple User License (1 Site) €4400.00
- Multiple User License (Global) €6600.00

### **Report description:**

Although the impact of COVID-19 continues in society in 2022, a gradual recovery of lifestyles is being seen, thanks to the lifting of the government's request that consumers refrain from going out or travelling, and the gradual easing of restrictions on inbound travellers. As a result, within consumer health, OTC products, which had been negatively affected by COVID-19, is expected to show a turnaround to growth, whilst the growth of sports nutrition, which had benefited from COVID-19, is set t...

Euromonitor International's Consumer Health in Japan report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2017-2021, allowing you to identify the sectors driving growth. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Allergy Care, Herbal/Traditional Products, OTC, Paediatric Consumer Health, Sports Nutrition, Vitamins and Dietary Supplements, Weight Management and Wellbeing.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Consumer Health market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## **Table of Contents:**

Consumer Health in Japan  
Euromonitor International  
October 2022

### List Of Contents And Tables

#### CONSUMER HEALTH IN JAPAN

##### EXECUTIVE SUMMARY

Consumer health in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for consumer health?

##### MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2017-2022

Table 2 Life Expectancy at Birth 2017-2022

##### MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2017-2022

Table 4 Sales of Consumer Health by Category: % Value Growth 2017-2022

Table 5 NBO Company Shares of Consumer Health: % Value 2018-2022

Table 6 LBN Brand Shares of Consumer Health: % Value 2019-2022

Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2017-2022

Table 8 Distribution of Consumer Health by Format: % Value 2017-2022

Table 9 Distribution of Consumer Health by Format and Category: % Value 2022

Table 10 □Forecast Sales of Consumer Health by Category: Value 2022-2027

Table 11 □Forecast Sales of Consumer Health by Category: % Value Growth 2022-2027

##### APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

Summary 1 OTC: Switches 2021-2022

##### DISCLAIMER

##### DEFINITIONS

##### SOURCES

Summary 2 Research Sources

#### ANALGESICS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Analgesics faces decline after a strong year, also affected by consumers' infection prevention practices and slow recovery of inbound travel

Products that respond to concern about infection with COVID-19 and adverse reactions to vaccination are emerging

Topical analgesics/anaesthetic continues its recovery due to the appeal of its efficacy on specific areas and formula innovations

##### PROSPECTS AND OPPORTUNITIES

Analgesics set to see recovery, but volume sales expected to remain lower than in 2019

Steady domestic demand and a resurgence of inbound demand will continue to drive recovery for topical analgesics/anaesthetic

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

The proliferation of rival treatments is becoming a threat to analgesics

#### CATEGORY DATA

Table 12 Sales of Analgesics by Category: Value 2017-2022

Table 13 Sales of Analgesics by Category: % Value Growth 2017-2022

Table 14 NBO Company Shares of Analgesics: % Value 2018-2022

Table 15 LBN Brand Shares of Analgesics: % Value 2019-2022

Table 16 Forecast Sales of Analgesics by Category: Value 2022-2027

Table 17 Forecast Sales of Analgesics by Category: % Value Growth 2022-2027

#### COUGH, COLD AND ALLERGY (HAY FEVER) REMEDIES IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Cough, cold and allergy (hay fever) remedies sees slight growth, although recovery is slow as consumers continue to take precautions against infectious diseases

Systemic antihistamines/allergy remedies and nasal sprays show recovery due to the return of activities outside the home

Pharyngeal preparations continues to decline

##### PROSPECTS AND OPPORTUNITIES

Demand for cough, cold and allergy (hay fever) remedies to recover, but sales will remain lower than pre-COVID-19

As the treatment of hay fever is attracting attention, demand for systemic antihistamines/allergy remedies is expected to recover

Paediatric allergy remedies expected to show a recovery of demand, but paediatric cough/cold remedies set to be negatively impacted by declining birth rate

#### CATEGORY DATA

Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2017-2022

Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2017-2022

Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2018-2022

Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2022

Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2022-2027

Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2022-2027

#### DIGESTIVE REMEDIES IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Although the impact of COVID-19 continues in digestive remedies, demand is recovering due to increased opportunities to go out

Growth for motion sickness remedies as restrictions on medium and long distance travel ease in 2022

Indigestion and heartburn remedies rebounds due to increased opportunities for dining out and social gatherings

##### PROSPECTS AND OPPORTUNITIES

Digestive remedies expected to see a temporary rebound, but demand set to decline over the medium to long term

Demand for indigestion and heartburn remedies expected to slump again, and sales set to shrink

Product innovation to address weakened gastrointestinal function due to stress and ageing expected to spark new demand

#### CATEGORY DATA

Table 24 Sales of Digestive Remedies by Category: Value 2017-2022

Table 25 Sales of Digestive Remedies by Category: % Value Growth 2017-2022

Table 26 NBO Company Shares of Digestive Remedies: % Value 2018-2022

Table 27 LBN Brand Shares of Digestive Remedies: % Value 2019-2022

Table 28 Forecast Sales of Digestive Remedies by Category: Value 2022-2027

Table 29 Forecast Sales of Digestive Remedies by Category: % Value Growth 2022-2027

#### DERMATOLOGICALS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Growth of dermatologicals remains stable in 2022, but performances vary across categories

Reduced activity and prolonged telecommuting maintain sales of haemorrhoid treatments

COVID-19 increases the time spent at home, and the demand for self-care for scalp problems and thinning hair increases

#### PROSPECTS AND OPPORTUNITIES

Dermatologicals will remain steady after 2023

New lifestyles and impact of COVID-19 to maintain sales of haemorrhoid treatments in the early forecast period

Hair loss treatments expected to grow, but fierce competition will require brands to consider pricing and distribution strategies

#### CATEGORY DATA

Table 30 Sales of Dermatologicals by Category: Value 2017-2022

Table 31 Sales of Dermatologicals by Category: % Value Growth 2017-2022

Table 32 NBO Company Shares of Dermatologicals: % Value 2018-2022

Table 33 LBN Brand Shares of Dermatologicals: % Value 2019-2022

Table 34 LBN Brand Shares of Hair Loss Treatments: % Value 2019-2022

Table 35 Forecast Sales of Dermatologicals by Category: Value 2022-2027

Table 36 Forecast Sales of Dermatologicals by Category: % Value Growth 2022-2027

#### NRT SMOKING CESSATION AIDS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Decline in smokers means fewer potential customers

Price hikes encourage consumers to quit smoking, but e-cigarettes are becoming a threat to NRT smoking cessation aids

Lowering the age of adulthood by amending the civil code does not lead to more smokers

##### PROSPECTS AND OPPORTUNITIES

Sales set to continue to decline as many consumers shift from cigarettes to heated tobacco before quitting smoking

Sluggish demand for cigarettes is an irreversible trend

Tobacco substitutes are also diversifying, and the competitive environment is intensifying

#### CATEGORY INDICATORS

Table 37 Number of Smokers by Gender 2017-2022

#### CATEGORY DATA

Table 38 Sales of NRT Smoking Cessation Aids by Category: Value 2017-2022

Table 39 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2017-2022

Table 40 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2018-2022

Table 41 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2019-2022

Table 42 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2022-2027

Table 43 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2022-2027

#### SLEEP AIDS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Lifestyle changes caused by COVID-19 support demand for sleep aids

Increasing number of non-OTC products with sleep claims a headwind to growth

Increasing awareness of self-care has maintained sales of sleep aids

##### PROSPECTS AND OPPORTUNITIES

Declines expected in the forecast years, as the competition with non-OTC products remains a threat

Increasing sleep-related technologies and products will boost consumers' interest in improved sleep quality

Widespread use of smartwatches increases consumers' interest in improving sleep

#### CATEGORY DATA

Table 44 Sales of Sleep Aids: Value 2017-2022

Table 45 Sales of Sleep Aids: % Value Growth 2017-2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 46 NBO Company Shares of Sleep Aids: % Value 2018-2022

Table 47 LBN Brand Shares of Sleep Aids: % Value 2019-2022

Table 48 Forecast Sales of Sleep Aids: Value 2022-2027

Table 49 Forecast Sales of Sleep Aids: % Value Growth 2022-2027

#### EYE CARE IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Eye care is slow to regain inbound traveller demand, but grows as domestic demand recovers as COVID-19 restrictions ease

Activity in animations and celebrity collaborations to promote to younger customers

Products with eye care appeal are diversifying

##### PROSPECTS AND OPPORTUNITIES

Eye care expected to recover in the forecast years

High value-added products will drive growth in value terms

Surgical procedures to correct vision are increasing, but will have little impact in the medium to long term

##### CATEGORY DATA

Table 50 Sales of Eye Care by Category: Value 2017-2022

Table 51 Sales of Eye Care by Category: % Value Growth 2017-2022

Table 52 NBO Company Shares of Eye Care: % Value 2018-2022

Table 53 LBN Brand Shares of Eye Care: % Value 2019-2022

Table 54 Forecast Sales of Eye Care by Category: Value 2022-2027

Table 55 Forecast Sales of Eye Care by Category: % Value Growth 2022-2027

#### WOUND CARE IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Demand for wound care declines in value terms

Little change seen in the competitive environment, with brand recognition helping to maintain share

A major earthquake leads to stable demand for disaster preparedness

##### PROSPECTS AND OPPORTUNITIES

Popularity of outdoor leisure activities will be an opportunity for wound care

Promotion of high function products and product usage will be important to achieve recovery

Separation between high-priced products and inexpensive private label products expected

##### CATEGORY DATA

Table 56 Sales of Wound Care by Category: Value 2017-2022

Table 57 Sales of Wound Care by Category: % Value Growth 2017-2022

Table 58 NBO Company Shares of Wound Care: % Value 2018-2022

Table 59 LBN Brand Shares of Wound Care: % Value 2019-2022

Table 60 Forecast Sales of Wound Care by Category: Value 2022-2027

Table 61 Forecast Sales of Wound Care by Category: % Value Growth 2022-2027

#### VITAMINS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Prolonged anxieties caused by COVID-19 continue to drive sales of vitamins

Vitamin D continues to attract attention, due to its function against COVID-19

Tonics suffers a decline, but brand players look for innovations, and new formats have increasingly been seen

##### PROSPECTS AND OPPORTUNITIES

Further growth in both multivitamins and single vitamins is expected to reflect consumers' continuous interest in and demand for healthy living

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Brands set to shift to e-commerce, ultimately online D2C channels

#### CATEGORY DATA

Table 62 Sales of Vitamins by Category: Value 2017-2022

Table 63 Sales of Vitamins by Category: % Value Growth 2017-2022

Table 64 Sales of Multivitamins by Positioning: % Value 2017-2022

Table 65 NBO Company Shares of Vitamins: % Value 2018-2022

Table 66 LBN Brand Shares of Vitamins: % Value 2019-2022

Table 67 Forecast Sales of Vitamins by Category: Value 2022-2027

Table 68 Forecast Sales of Vitamins by Category: % Value Growth 2022-2027

#### DIETARY SUPPLEMENTS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Diverse health benefits of lactobacilli attract consumers with a wide range of needs, especially immunity improvement, driving growth in probiotic supplements

Brain health is a hot topic in Japan, which is an ageing society

Continuous demand for supplements for mental health

##### PROSPECTS AND OPPORTUNITIES

NMN (Nicotinamide Mononucleotide) is an ingredient increasingly used for anti-ageing

Femcare is attracting attention

#### CATEGORY DATA

Table 69 Sales of Dietary Supplements by Category: Value 2017-2022

Table 70 Sales of Dietary Supplements by Category: % Value Growth 2017-2022

Table 71 Sales of Dietary Supplements by Positioning: % Value 2017-2022

Table 72 NBO Company Shares of Dietary Supplements: % Value 2018-2022

Table 73 LBN Brand Shares of Dietary Supplements: % Value 2019-2022

Table 74 Forecast Sales of Dietary Supplements by Category: Value 2022-2027

Table 75 Forecast Sales of Dietary Supplements by Category: % Value Growth 2022-2027

#### WEIGHT MANAGEMENT AND WELLBEING IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Growing consumer health consciousness continues to drive interest in and demand for a healthy body

Consumer demand to lose COVID-19 weight gain maintains value growth in weight management and wellbeing

##### PROSPECTS AND OPPORTUNITIES

Healthy eating habits expected to have a negative impact on meal replacement

Weight loss supplements and supplement nutrition drinks set to perform well, due to consumers' desire to maintain a healthy diet

Waitness shows a new approach, of personalised supplements with a digital weight management service

#### CATEGORY DATA

Table 76 Sales of Weight Management and Wellbeing by Category: Value 2017-2022

Table 77 Sales of Weight Management and Wellbeing by Category: % Value Growth 2017-2022

Table 78 NBO Company Shares of Weight Management and Wellbeing: % Value 2018-2022

Table 79 LBN Brand Shares of Weight Management and Wellbeing: % Value 2019-2022

Table 80 Forecast Sales of Weight Management and Wellbeing by Category: Value 2022-2027

Table 81 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2022-2027

#### SPORTS NUTRITION IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Sports nutrition continues to grow, but the rate of increase slows due to fewer new users

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Trend towards differentiating products with ingredients other than protein in order to meet diversifying consumer needs  
Growth of e-commerce makes foreign brands highly competitive, and they are becoming a threat to domestic brands

#### PROSPECTS AND OPPORTUNITIES

Health consciousness supports the demand for sports nutrition, but competition with food, beverages and nutritional supplements expected to intensify

Price increases due to rising raw materials and transportation costs may be a headwind

Concept of customised or personalised protein products expected to become popular

#### CATEGORY DATA

Table 82 Sales of Sports Nutrition by Category: Value 2017-2022

Table 83 Sales of Sports Nutrition by Category: % Value Growth 2017-2022

Table 84 NBO Company Shares of Sports Nutrition: % Value 2018-2022

Table 85 LBN Brand Shares of Sports Nutrition: % Value 2019-2022

Table 86 Forecast Sales of Sports Nutrition by Category: Value 2022-2027

Table 87 Forecast Sales of Sports Nutrition by Category: % Value Growth 2022-2027

#### HERBAL/TRADITIONAL PRODUCTS IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Kampo (Chinese herbal medicine) gains attention as the concepts of prevention and immunity enhancement become more popular

Kampo is shown to be effective in the treatment and sequelae of COVID-19

Channel strategy and development of high value-added products is important in aojiru

#### PROSPECTS AND OPPORTUNITIES

Kampo expected to maintain demand due to combination with OTC drugs and online services

Development of products with a less bitter flavour is key to growth in ginseng

Expectations that aojiru will diversify from health to relaxation and beauty

#### CATEGORY DATA

Table 88 Sales of Herbal/Traditional Products by Category: Value 2017-2022

Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2017-2022

Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2018-2022

Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2019-2022

Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2022-2027

Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2022-2027

#### PAEDIATRIC CONSUMER HEALTH IN JAPAN

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Some paediatric OTC products trend similar to adult OTC products, but this is not the case for paediatric acetaminophen

Emergence of junior supplements in various formats which are easier for children to consume

Civil code amendment lowers age of adulthood, but does not change age of adult eligibility for OTC products

#### PROSPECTS AND OPPORTUNITIES

Sales of paediatric OTC products expected to stagnate due to ageing of the population and declining birth rate

With increasing sports opportunities, sports protein for juniors also expected to grow

Products that fulfil the concept of Bunbu Ryodo will attract demand

#### CATEGORY DATA

Table 94 Sales of Paediatric Consumer Health by Category: Value 2017-2022

Table 95 Sales of Paediatric Consumer Health by Category: % Value Growth 2017-2022

Table 96 Sales of Paediatric Vitamins and Dietary Supplements by Type: % Value 2017-2022

Table 97 NBO Company Shares of Paediatric Consumer Health: % Value 2018-2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 98 LBN Brand Shares of Paediatric Consumer Health: % Value 2019-2022

Table 99 Forecast Sales of Paediatric Consumer Health by Category: Value 2022-2027

Table 100 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2022-2027



## Consumer Health in Japan

Market Direction | 2022-10-13 | 112 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€2200.00
	Multiple User License (1 Site)	€4400.00
	Multiple User License (Global)	€6600.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com