

## Consumer Health in Japan

Market Direction | 2023-10-20 | 118 pages | Euromonitor

### AVAILABLE LICENSES:

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

### Report description:

Sales of OTC products in Japan continue on the path to recovery in 2023 as the country sees an end to the pandemic. With the World Health Organisation (WHO) declaring the pandemic to be over in early 2023 there have been increased opportunities to go out and return to a mask-free lifestyle, while there has been an increased demand for products with higher unit prices with a higher level of active ingredients that can deliver immediate results. Motion sickness remedies and digestive remedies have...

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 2018-2022, allowing you to identify the sectors driving growth. Forecasts to 2027 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

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

## Table of Contents:

Consumer Health in Japan  
Euromonitor International  
October 2023

### List Of Contents And Tables

#### CONSUMER HEALTH IN JAPAN

##### EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer health?

##### MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

Table 2 Life Expectancy at Birth 2018-2023

##### MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2018-2023

Table 4 Sales of Consumer Health by Category: % Value Growth 2018-2023

Table 5 NBO Company Shares of Consumer Health: % Value 2019-2023

Table 6 LBN Brand Shares of Consumer Health: % Value 2020-2023

Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

##### 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

##### 2023 DEVELOPMENTS

Mixed fortunes for analgesics in 2023 with topical analgesics/anaesthetic being key to growth

Salonpas benefits from rebound in demand for topical analgesics/anaesthetic, while Loxonin S continues to make waves

Players focus on adding value to their product lines

##### PROSPECTS AND OPPORTUNITIES

Stable outlook for analgesics with challenges and opportunities presenting themselves

New product development expected to focus on treating the causes of pain and stiffness

Players will need to address negative image issues to maintain demand

##### CATEGORY DATA

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

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

www.scotts-international.com

Table 12 Sales of Analgesics by Category: Value 2018-2023

Table 13 Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

A return to pre-pandemic lifestyles spells good news for sales of cough, cold and allergy (hay fever) remedies

Lifting of COVID-19 restrictions and control measures a positive for sales of antihistamines/allergy remedies

Prices rise as players focus on providing faster and more effective relief

PROSPECTS AND OPPORTUNITIES

Positive influences on demand expected to be offset by negative ones

Players will need to invest in new product development and marketing to help increase demand for antihistamines/allergy remedies

Players could look to promote reduced side effects as a way of differentiating their products

CATEGORY DATA

Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

DIGESTIVE REMEDIES IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Digestive remedies on the path to recovery as consumers become more socially active again and resume their busy pre-pandemic lifestyles

Players focus on different audiences within motion sickness remedies as they look to capitalise on the renewed demand

Contrasting fortunes for diarrhoeal remedies and laxatives

PROSPECTS AND OPPORTUNITIES

A shrinking population and an increased focus on preventative health likely to hinder growth opportunities for digestive remedies

Motion sickness remedies still has scope for development as consumers start to travel again

Players could look to expand their reach to new target audiences

CATEGORY DATA

Table 24 Sales of Digestive Remedies by Category: Value 2018-2023

Table 25 Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 26 NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 27 LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 28 Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 29 Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

DERMATOLOGICALS IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

A largely positive performance from dermatologicals in 2023 as consumers put the pandemic behind them

Hair loss treatments branching out to meet the needs of new consumer groups

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

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

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

Another tough year for topical allergy remedies/antihistamines

#### PROSPECTS AND OPPORTUNITIES

Growing focus on skin care should benefit sales despite demographic challenges

Local companies taking proactive steps to halt the ongoing decline in Japan's birth rate

Hair loss treatment and prevention still seen to be full of potential

#### CATEGORY DATA

Table 30 Sales of Dermatologicals by Category: Value 2018-2023

Table 31 Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 32 NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 33 LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 34 LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 35 Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 36 Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

#### NRT SMOKING CESSATION AIDS IN JAPAN

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Smoking prevalence in decline as restrictions tighten up

Competition from heated tobacco intensifies as leading players drop their prices

Growing range of alternative smoking cessation services and products a barrier to growth

#### PROSPECTS AND OPPORTUNITIES

More smokers likely to quit in response to further tax hikes

Alternative products likely to provide stiff competition to NRT smoking cessation aids

Challenging future ahead for NRT smoking cessation aids as competition increases from legal and illegal channels

#### CATEGORY INDICATORS

Table 37 Number of Smokers by Gender 2018-2023

#### CATEGORY DATA

Table 38 Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 39 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 40 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 41 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 42 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 43 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

#### SLEEP AIDS IN JAPAN

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Obstacles and opportunities remain for sleep aids as sleep disorders in Japan continue to rise

Sleep aids faces competition from all angles as consumers become more literate about what ingredients can improve sleep quality

Alternatives to sleep aids growing in number

#### PROSPECTS AND OPPORTUNITIES

Players could look to expand their reach to a wider audience through product expansions and complementary products and services

Sleep supplements could cannibalise some sales of sleep aids

Intestines could hold the key to new innovations in the area of sleep aids

#### CATEGORY DATA

Table 44 Sales of Sleep Aids: Value 2018-2023

Table 45 Sales of Sleep Aids: % Value Growth 2018-2023

Table 46 NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 47 LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 48 Forecast Sales of Sleep Aids: Value 2023-2028

Table 49 Forecast Sales of Sleep Aids: % Value Growth 2023-2028

**EYE CARE IN JAPAN**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Eye care continues on the path to recovery as Japan is released from the grip of the pandemic

LINE opens up new marketing and engagement opportunities for eye care brands

Growing range of solutions to eye care on offer as consumers become more demanding

**PROSPECTS AND OPPORTUNITIES**

Category maturity an obstacle to growth

Social and digital marketing seen as vital to future growth opportunities

Players could look to focus on eye health from the inside and the outside

**CATEGORY DATA**

Table 50 Sales of Eye Care by Category: Value 2018-2023

Table 51 Sales of Eye Care by Category: % Value Growth 2018-2023

Table 52 NBO Company Shares of Eye Care: % Value 2019-2023

Table 53 LBN Brand Shares of Eye Care: % Value 2020-2023

Table 54 Forecast Sales of Eye Care by Category: Value 2023-2028

Table 55 Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

**WOUND CARE IN JAPAN**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Leading players offer broad range of products to meet the needs of consumers in Japan

Players explore new designs to capture the attention of consumers

Limited edition products catch the eye of collectors and fans

**PROSPECTS AND OPPORTUNITIES**

New product development may be needed to address category maturity

Functionality set to remain a key focus of innovation and new product development

Education and awareness campaigns could benefit sales of wound care

**CATEGORY DATA**

Table 56 Sales of Wound Care by Category: Value 2018-2023

Table 57 Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 LBN Brand Shares of Wound Care: % Value 2020-2023

Table 60 Forecast Sales of Wound Care by Category: Value 2023-2028

Table 61 Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

**VITAMINS IN JAPAN**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Vitamins continues to see healthy demand as consumers remain focused on health and wellbeing

Producers of tonics branch out into products targeting relaxation

Vitamin D receiving more attention as awareness of its benefits grows

**PROSPECTS AND OPPORTUNITIES**

Growing interest in and awareness of the benefits of vitamins set to boost demand

Competition expected to intensify as targeted solutions find growing appeal across vitamins and dietary supplements

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

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

www.scotts-international.com

DHC continuing on low-price strategy despite acquisition by Orix

#### CATEGORY DATA

Table 62 Sales of Vitamins by Category: Value 2018-2023

Table 63 Sales of Vitamins by Category: % Value Growth 2018-2023

Table 64 Sales of Multivitamins by Positioning: % Value 2018-2023

Table 65 NBO Company Shares of Vitamins: % Value 2019-2023

Table 66 LBN Brand Shares of Vitamins: % Value 2020-2023

Table 67 Forecast Sales of Vitamins by Category: Value 2023-2028

Table 68 Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

#### DIETARY SUPPLEMENTS IN JAPAN

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Dietary supplements continues to grow backed by new innovations and increasing product awareness

Aojiru producers looking to reach a younger audience

Suntory Wellness retains the lead thanks to trusted image and strong investment in marketing and advertising

##### PROSPECTS AND OPPORTUNITIES

Dietary supplements expected to benefit from investment in new product development and innovation

Overseas markets could open up new opportunities for local brands of dietary supplements both at home and abroad

Adopting an omnichannel approach to retailing could play a key role in driving demand

#### CATEGORY DATA

Table 69 Sales of Dietary Supplements by Category: Value 2018-2023

Table 70 Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 71 Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 72 NBO Company Shares of Dietary Supplements: % Value 2019-2023

Table 73 LBN Brand Shares of Dietary Supplements: % Value 2020-2023

Table 74 Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 75 Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

#### WEIGHT MANAGEMENT AND WELLBEING IN JAPAN

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Resurgent demand for weight management and wellbeing as consumers become more health conscious

Questionable business practices cast a negative light on weight management and wellbeing

New product development remains a feature of weight management and wellbeing

##### PROSPECTS AND OPPORTUNITIES

Personalised weight loss plans could add value to the category

New law will prevent misleading stealth marketing

Health and wellness packaged food and beverages could pose strong competition to weight management and wellbeing

#### CATEGORY DATA

Table 76 Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 77 Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 78 NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 79 LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 80 Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 81 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

#### SPORTS NUTRITION IN JAPAN

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Sports nutrition continues to see dynamic growth as the consumer base continues to grow and expand

Competition intensifies as players look to capitalise on the growing demand

Product variety helping to fuel interest in sports protein

#### PROSPECTS AND OPPORTUNITIES

Sports nutrition still has room to grow but new strategies may be required to offset the impact of Japan's shrinking population

Players likely to invest in new product development to differentiate themselves from the competition

Sports nutrition set to face growing competition from products that fall outside the category

#### CATEGORY DATA

Table 82 Sales of Sports Nutrition by Category: Value 2018-2023

Table 83 Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 84 NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 85 LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 86 Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 87 Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

#### HERBAL/TRADITIONAL PRODUCTS IN JAPAN

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Improved outlook for herbal/traditional products in Japan, as players target a younger audience

Increase in inbound arrivals from Asia benefiting sales of herbal/traditional products in 2023

Negative publicity threatens sales of herbal/traditional products

#### PROSPECTS AND OPPORTUNITIES

Herbal/traditional products expected to see more variety as players look to tap into evolving consumer demands

Players will need to target new audiences to overcome the impact of Japan's shrinking population

Building consumer trust is key to the expansion of the category

#### CATEGORY DATA

Table 88 Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

#### PAEDIATRIC CONSUMER HEALTH IN JAPAN

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Mixed performances seen within paediatric consumer health in 2023

Players explore new opportunities as competition intensifies

Players focusing on offering products that are suitable for the whole family

#### PROSPECTS AND OPPORTUNITIES

Declining birth rate set to remain a significant obstacle to growth

Economic pressures expected to help sustain demand for paediatric vitamins and dietary supplements

Players could look to try and help address declining birth rate with new products and marketing

#### CATEGORY DATA

Table 94 Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2023-2028

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

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

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

**Consumer Health in Japan**

Market Direction | 2023-10-20 | 118 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*	Phone*	
First Name*	Last Name*	
Job title*		
Company Name*	EU Vat / Tax ID / NIP number*	
Address*	City*	
Zip Code*	Country*	
	Date	2026-02-13
	Signature	

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

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

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