

## **Health and Functional Food Ingredients Market in Japan: Key Research Findings 2016**

### ◆ Research Outline

**Yano Research Institute has conducted a study on the domestic health and functional food ingredients market with the following conditions:**

1. Research period: From July to September, 2016
2. Research targets: Bulk ingredient suppliers, health food contract manufacturers, health food manufacturers, relevant government offices, and other related organizations
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email/FAX, and literature research

**What is the health and functional food ingredients market?**

The health and functional food ingredients market in this research indicate 32 ingredients contained as principal elements in so-called health and functional foods. Refer to Figure 1 for details of those 32 ingredients.

### ◆ Key Findings

■ **FY2015 Health and Functional Food Ingredients Market Reached 100.915 Billion Yen**

The market size of health and functional food ingredients in FY2015 based on the shipment value at manufacturers attained 100.915 billion yen, 102.2% of the size of the previous fiscal year. Generally speaking, stable growth of the popular ingredients occupying the top ranking out of 32 health and functional food ingredients, such as DHA/EPA, royal jelly, collagen, BCAA, and blueberries (bilberries), have boosted the entire market. In spite of little change in the market environment where growing number of elderly population bringing about progressive aging society, inbound tourism demands by foreign visitors and the system of “Foods with Function Claims” that started in FY2015 seemed to have affected each of the functional ingredients market for the better.

■ **Increasing Number of Makers Placing More Importance on “Foods with Function Claims”**

Ever since the system of “Foods with Function Claims” started in April 2015, 400 of such functional foods were registered, which gradually started forming the market. There were cases of such a material as hyaluronic acid which successfully revitalized from its once stagnant market by appealing its functions through the system. Since the system is likely to affect the consumers’ choice of food, increasing number of health food manufacturers place more importance on the system to make a difference in the product sales

■ **Amino Acid Introduced for Multiple Applications including Locomotive Syndrome and Sports Nutrition**

Amino acid has continued being stably demanded as a material to fight against locomotive syndrome and for sports nutrition. With increasing population of the elderly and more measures needed to be taken against locomotive syndrome and sarcopenia, amino acid is likely to be needed further, so that the market is on the rise. In addition, ingredients for intestinal regulation have started winning attentions in recent years, as shown by improved awareness of intestinal flora among consumers.

◆ **Report format:**

Published report: “Consumer Awareness Survey of Health-Foods/Functional-Foods Materials 2016”

Issued on: October 11, 2016

Language: Japanese

Format: 544 pages in A4 format

Price: 130,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

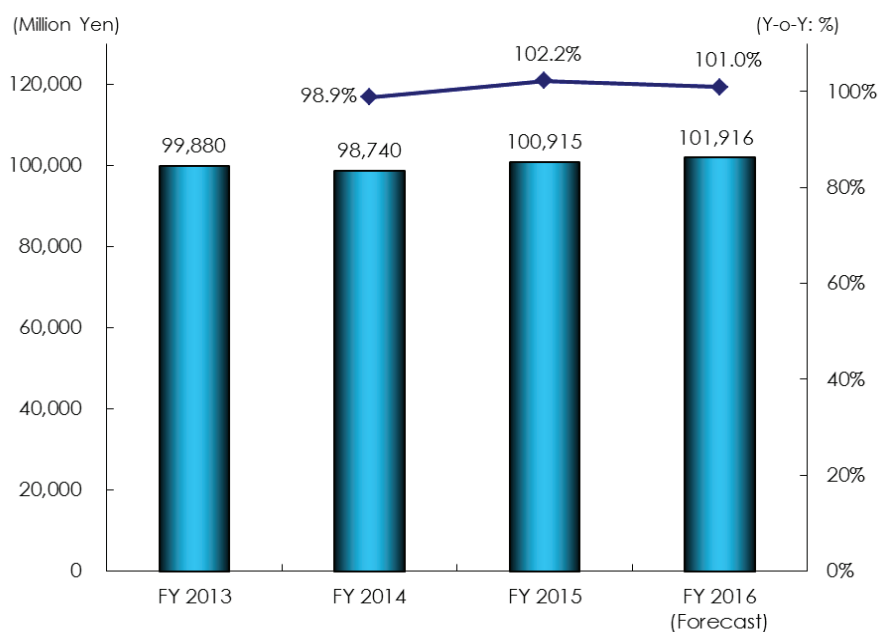
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■ **Figure 1: Transition and Forecast of Health and Functional Food Ingredients Market Size**



Estimated by Yano Research Institute

Notes:

1. The market size is based on shipment volume from manufacturers
2. Market size is the total of targeted 32 ingredients (Aojiru, astaxanthin, ginkgo leaves, turmeric, L-arginine, L-carnitine, L-citrulline, ornithine, nucleic acid (DNA-Na, nucleo-protein), chitin & chitosan, glucosamine, coenzyme Q10, collagen, chondroitin sulphate, ceramide, soybean isoflavone, DHA & EPA, saw palmetto, hyaluronic acid, BCAA, placenta, blueberry (bilberry), propolis, heme iron, maca, pine bark, lactoferin, green tea extract (catechin/theanine), lutein, reishi lucidum mushroom, resveratrol, and royal jelly).