

## **Health Food Market in Japan: Key Research Findings 2018**

### ◆ **Research Outline**

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

1. Research period: August 2017 to January 2018
2. Research objects: Health food OEM, sellers of health food (health food manufacturers, general food manufacturers, and pharmaceutical manufacturers), health food organizations, and the authorities concerned
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/FAX, mailed or emailed questionnaire, and literature research

**<What is Health Food?>**

Health food in this research indicates functional food in forms of tablets, capsules, powder, or bottled liquid.

### ◆ **Key Findings**

■ **Health Food Market in FY2017 Projected to Attain 761,900 Million Yen, 100.9% on Y-o-Y Basis**

Size of the domestic health food market in FY2017 is likely to achieve 761,900 million yen, 100.9% of that of the previous fiscal year, based on the shipment value at manufacturers. In addition to middle-aged and elderly people who are the primary users of health food, increasing number of younger people has become obviously conscious of health and beauty, with their interest on making healthy body invigorating the health food market in some cases. As consumers trying to maintain or press ahead with health seem to be on the rise, increase of users is expected to expand the health food market.

■ **Market Size of Foods with Function Claims Attained 136,460 Million Yen in FY2016, and Projected to Achieve 164,900 Million Yen by FY2017**

The market size of Foods with Function Claims, based on the shipment value at manufacturers, has reached 136,460 million yen in FY2016, and is likely to attain 164,900 million yen by FY2017. The market share by food type in FY2017 is: Supplement 45.7%, other processed food 48.9%, and Fresh food 5.4%.

■ **30% of Consumers in 30s and Over Have Experience of Taking Foods with Function Claims**

According to the questionnaire to the consumers in their 30s and over in relation to this research asking about the awareness and ingestion of Foods with Function Claims, about 70% knew about Function Claims, out of which about 30% already had such foods. In addition, the response rate that accounted for more than 20% respectively for the question which of the functions of such Foods with Function Claims that they had been interested in were: Combating of visceral fat, neutral fat, and anti-cholesterol.

## ◆ Report Format:

Published Report: “Health Foods Market 2018”

Issued on: January 31, 2018

Language: Japanese

Format: 683 pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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## ■ Table 1: Transition of Size of Health Food Market by Sales Channel

Unit: Million Yen

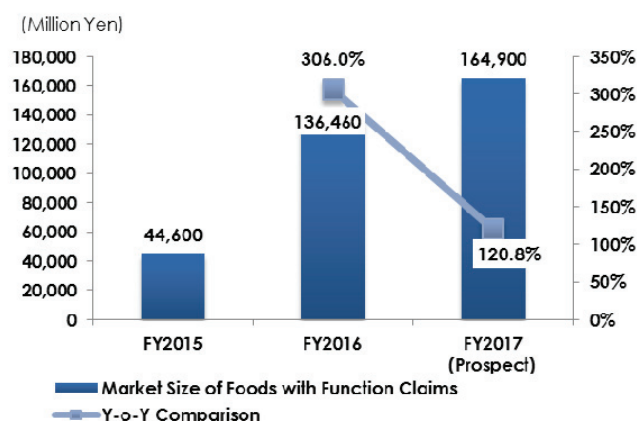
Sales Channels Market Size	FY 2015			FY 2016			FY 2017 (Prospect)			FY 2018 (Forecast)		
	Market Size	Y-o-Y	Market Share	Market Size	Y-o-Y	Market Share	Market Size	Y-o-Y	Market Share	Market Size	Y-o-Y	Market Share
Door-to-door sales	234,000	99.6%	31.5%	232,800	99.5%	30.8%	231,700	99.5%	30.4%	230,500	99.5%	30.0%
Mail order sales	309,100	103.4%	41.6%	316,800	102.5%	42.0%	320,000	101.0%	42.0%	323,200	101.0%	42.1%
Pharmaceutical channel	107,530	111.2%	14.5%	110,800	103.0%	14.7%	115,200	104.0%	15.1%	118,700	103.0%	15.5%
Food-store channel	26,900	101.5%	3.6%	27,200	101.1%	3.6%	27,300	100.4%	3.6%	27,300	100.0%	3.6%
Health food channel	16,800	107.7%	2.3%	17,600	104.8%	2.3%	17,700	100.6%	2.3%	17,700	100.0%	2.3%
Other channels	49,200	102.5%	6.6%	49,600	100.8%	6.6%	50,000	100.8%	6.6%	50,000	100.0%	6.5%
Health Food Market Size (Total)	743,530	103.2%	100.0%	754,800	101.5%	100.0%	761,900	100.9%	100.0%	767,400	100.7%	100.0%

Survey by Yano Research Institute

Notes:

1. The market size is based on the shipment value at manufacturers.
2. The health foods in this research indicate functional foods in forms of tablet, capsule, powder, or bottled liquid.
3. Pharmaceutical channel is the channel that supplies products to drugstores and pharmacies, food-store channel is that to supply products to food-handling convenience stores, mass merchandisers, and supermarkets, and health food channel is that to supply products to health food specialty stores. Other channels include those medicines arranged to be kept at households, aesthetic salons, fitness clubs & gyms, hospitals and other service channels.

## ■ Figure 2: The Market Size of Foods with Function Claims

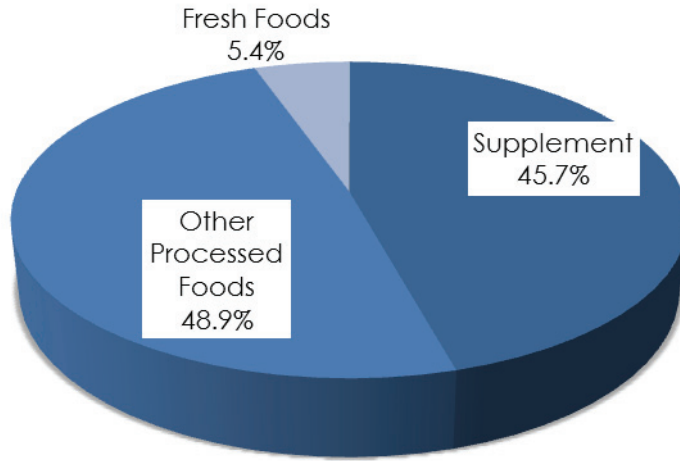


Survey by Yano Research Institute

Notes:

4. The market size is based on the shipment value at manufacturers.
5. The market objects are only those products that are accepted by the Consumer Affairs Agency.

■ **Figure 3: Composition Ratio of Foods with Function Claims by Food Type (FY2017 Prospect)**

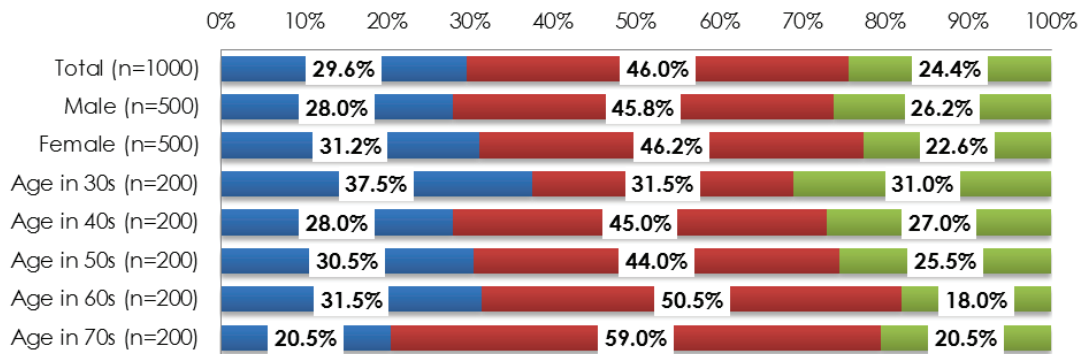


Survey by Yano Research Institute

Notes:

- 6. The market size is based on the shipment value at manufacturers.
- 7. The market objects are only those products accepted by the Consumer Affairs Agency.

■ **Figure 4: Awareness and Ingestion of Foods with Function Claims**



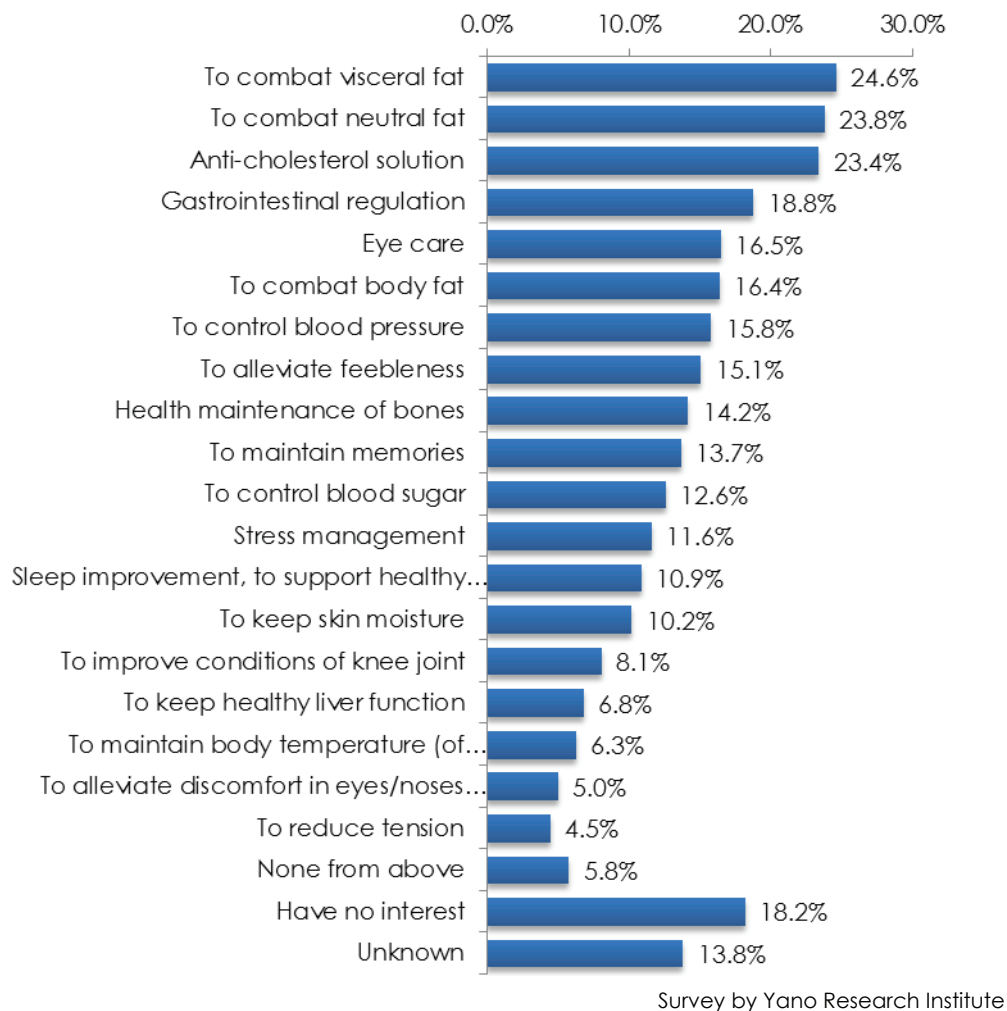
- Know about and actually have taken the products of Foods with Function Claims
- Know about Foods with Function Claims but have not taken the products
- Do not know about Foods with Function Claims

Survey by Yano Research Institute

Notes:

- 8. Research period: December 2017, Research objects: 1,000 men and women living in Japan aged 30 and over (gender and age have been equally apportioned), Method of research: Online, single response allowed.

■ **Figure 5: Interested Functions of Foods with Function Claims**



Notes:

9. “Eye care” indicates controlling of eye conditions, alleviating fatigue of eyes, a function of focus mechanism, keeping health of yellow spots, and etc.
10. Research period: December 2017, Research objects: 1,000 men and women living in Japan aged 30 and over (gender and age have been equally apportioned), Method of research: Online, multiple responses allowed.