

Functional Foods / Health-oriented Foods

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TRENDS OF HEALTH ORIENTED FOOD MARKET IN JAPAN

There is a remarkable growth in population of those over the age of 65, and products from the health oriented food market targeting middle age and elderly people are quite active (estimated elderly rate of 2030: Tokyo 28.0%, UK 20.9%, US 19.8%, China 15.9%). It is pointed out that the life style of Japanese people changed since 3.11 East Japan Great Earthquake, especially towards the idea of "looking after your own health conditions." While people are trying to save up and stop spending on unnecessary things, investment towards health seems to be expanding along with the aged population.

Here is the recent result of an online survey held annually by a consumer research group of Health and Food Forum. The survey was taken by about 350 male and 350 female (total of 726 people) of age 20-70 who have health orientated food over once a week. The graphs show the results of questions regarding health problems and health oriented products. Table 1 is the result for "symptoms that you are concerned about on a daily basis" and Table 2 shows "symptoms that you want to improve by taking health oriented products." Both Tables 1 and 2 show answers of male and female with multiple answers. Representative symptoms regarding health are "weakening eyesight," "body fat," and "blood pressure" for males, "stiff shoulders," "cold sensitivity," and "constipation" for females.

Table 1 Symptoms that you are concerned about on a daily basis
 (Multiple answers, unit %)

Weakening eyesight	38.7
Stiff shoulders	37.6
Low back pain	35.8
Easily tired	34.7
Eyestrain	31.7
Dental health	30.2
Cold sensitivity	29.3
Decline of muscle	29.2
Body fat	28.8
Cholesterol	28
Neutral fat	26.5
Stress	25.5
Blood pressure	25
Obesity	24.8
Hair (baldness)	24.8

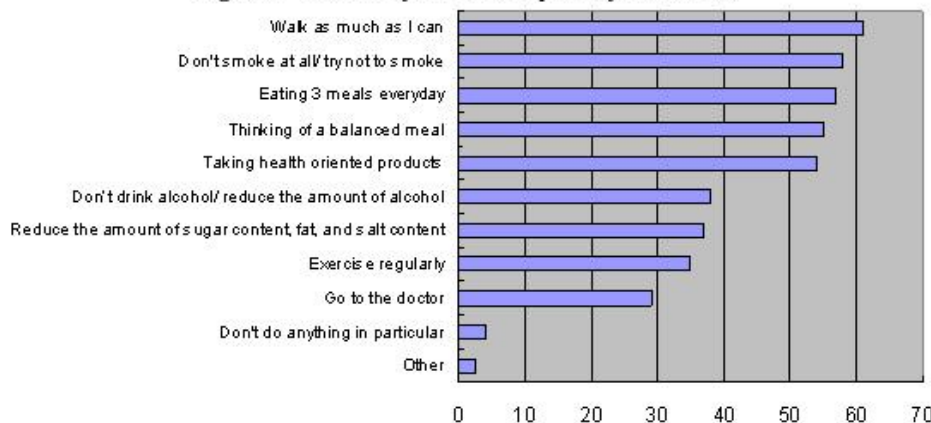
Table 2 Symptoms that you want to improve by taking health oriented products
 (Multiple answers, unit: %)

Easily tired	23.3
Weakening eyesight	18.7
Eyestrain	18.4
Lack of vitamins	17.6
Skin conditions	16.8
Body fat	15.6
Cholesterol	15.4
Neutral fat	15.4
Joint pain	15.2
Obesity	14
Constipation	13.7
Stiff shoulders	13.5
Low back pain	13.2

The answers to the question "What do you do to improve your health?" are shown in Figure 1.

The top 3 answers were "walk as much as I can," "don't smoke at all, try not to smoke," and "eating 3 meals every day." In 4th came "taking health oriented products" with 54%. When asked about specific names of the health oriented products taken regularly (over once a week), there were a total of 526 products in the order of glucosamine, chondroitin, multi-vitamins, blueberries, black vinegar/kouzu (fermented rice vinegar), garlic, and vitamin C. Supplements ranked higher than foods since the functions are more obvious. These products are mostly purchased online (42%), and this is followed by drug stores (27%), mail order (catalogue, magazine, newspaper) (11%), and supermarkets remained low at 5% possibly due to lack of variety. Even within mail order, TV and radio accounts for only 1%. The possible answer for this is because there are continued users.

Figure 1 What do you do to improve your health?



Most people get their information about health oriented products through the Internet/ PC (47%). Store counters, TV and from family & friends each were from 20-30%. Information from specialists such as doctors or pharmacist remained low at 5%. Information gained from the Internet is "the effects" (60%), "functional ingredients" (15%), and "safety" (10%).

Table 3 Trends of the main market for health oriented products

	2009/2010	2010/2011
Bone, joints	42.8 billion yen (116.9%)	47.6 billion yen (111.2%)
Diet	73.9 billion yen (105.1%)	78.2 billion yen (105.8%)
Beautiful skin	86.6 billion yen (103.3%)	89.6 billion yen (103.5%)
Nutritional fortification	95.8 billion yen (103.8%)	98.3 billion yen (102.6%)

Sources: Fuji Keizai

Locomotive related products have a steady market of nearly 50 billion yen with demands for products including glucosamine and chondroitin to ease joint pain for middle age and elderly people. Products related to beautiful skin are also popular among middle age and elderly women, and there is a 100 billion yen market for supplements where the main components are vitamin C, collagen, or hyaluronic acid.

The main pillars are collagen and hyaluronic acid, which are both strong at drugstores and mail order market. Also, placenta is a popular product. Although the market is quite small at 5 billion yen, it is estimated to grow in the future because of its effects for beautiful skin and effects to easing tiredness. For products related to easing tiredness, royal jelly and garlic are traditional nutritional fortification with firm grounds. With its history and background of Chinese herbal medicine, it captures the attention of consumers. This field has an estimate of nearly 100 billion yen market, and there are possibilities of further expansion due to the aging society.

On the other hand, dieting supplements that target young women include protein, garcinia cambogia, and gymnemic acid. Products that control the calories after eating a meal and products that burn fat are attracting interest.