

2024 Global Wellness Summit
Country Briefing Paper

JAPAN

By Maruyama Tomonori

1. What is currently making headlines in your country when it comes to health and wellness?

Sleep Innovation

In Japan, where the average sleeping time is the shortest in the world, lactic acid bacteria drinks that improve sleep quality are a big hit. A business hotel chain offers an environment and experience specialized for a good night's sleep based on joint research with a university, and its "if you can't sleep, we'll give you a full refund" system has become a hot topic. In addition, the number of participating companies in the sleep-related business community "ZAKONE" has reached 118, and cross-industrial innovation utilizing sleep data analysis technology is also progressing.

Sauna Community for Biz

In Japan, there is a huge boom in the use of sauna, which is a form of sauna that regulates the body and mind by repeatedly taking a high-temperature sauna, a cold bath, and an outdoor air bath. In response to this trend, 241 companies are currently members of the JAPAN SAUNA-BU ALLIANCE, a business association of sauna enthusiasts. Many sauna facilities that offer benefits to employees of member companies have become social venues for business networking.

Gut Health Activities ("Cho-katsu")

Cho-katsu that leads to stress management and mental health improvement, fermented dietary fiber that regulates the intestinal environment, and dieting methods that balance intestinal bacteria unique to Japanese people are trend now.

Protein for Beauty

The beauty effects of protein, which not only builds muscle but also improves the growth of skin and nails and the elasticity and luster of hair, of which protein is a major component, are attracting attention.

2. What do you think are your country's strengths and weaknesses when it comes to the various sectors of the wellness economy?

Wellness Tourism / Real Estate

Strengths : Currency depreciation (weak yen), variety of hot springs, snow quality at ski resorts, abundant forested environment, scenic beauty in all four seasons, resurgence of golf boom, nationwide stadium construction pipelines.

Weaknesses : Labor shortage due to low birthrate and aging population, low English-speaking proficiency, high cost of construction materials

Traditional & Complementary Medicine

Strengths : Zen culture, authentic healthy foods, a lifestyle that brings health and longevity (in blue

zone) and a zest for life (ikigai).

Public Health, Prevention & Personalized Medicine

Strengths : Advanced research on IPS cells and regenerative medicine

Weaknesses : Lack of awareness of health investment brought about by an overly comprehensive universal health insurance system.

3. The theme of this year's Summit is "A Watershed Moment for Wellness." What wellness industry developments, business opportunities, or trends are emerging at this pivotal moment for your country this year?

Development of Sports Industry and Cities

In recent years, the inauguration of the Japan Sports Agency and the Tokyo Olympics have triggered an increase in the popularity of the sports industry in Japan. In addition to the popular baseball and soccer leagues, professional leagues for basketball, rugby, volleyball, table tennis, and other sports have sprung up across the board, and projects are underway to build large arenas and stadiums throughout Japan. With these as the core, spas/saunas, hotels, and amusement/commercial facilities are being developed in cooperation with local governments and companies that own professional baseball teams to serve as a catalyst for regional revitalization.

Restructuring of Drugstore Industry / Sophistication of Health Data Utilization

In recent years, the drugstore chain market, which offers a variety of products and dispensing pharmacy services to maintain daily health and beauty, has been expanding and the industry has been restructuring. In December 2024, the health insurance card for all citizens will be replaced by a My Number Card (personal identification number card), which will allow the use of personal medical data with the consent of the individual. In the future, personal wellness services with much higher precision than before will be provided in conjunction with personal health records collected by wearable devices and AI.

Reskilling of Seniors (Potential to Promote Next Generation Wellness Industry)

To support an economy and society struggling with a declining working-age population, the government is encouraging "reskilling" of the pre- and post-retirement generation to lead them into second careers in highly productive occupations. In particular, an increase in the number of people studying biotechnology and data science, which are the subjects of subsidies, will raise the nation's health literacy level and foster the next generation of advanced wellness service industries.

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