



# Healthy Marketing in a post-pandemic world

3rd DSM Japan Sustainability Forum

# We are Brand Positioning Experts in Food & Health

私達は食と健康におけるブランドポジショニングのエキスパートです

Strategic Directions for Healthier Brands & Healthier Business

より健康的なブランドとビジネスのための戦略

## We will tell you

**What** is happening in food and health,  
何が食と健康に起こっているのか

**Why** it is happening and most importantly,  
なぜそれが起こるのか、そして最も重要なことには

**How** you can make it happen for your brand  
どうやってあなたのブランドでそれを実現するか

**NEW BRAND CREATION**

**NEW DIRECTION**

**NEW LIFE**



## CONSULTING



## INSPIRATION



## TRAINING

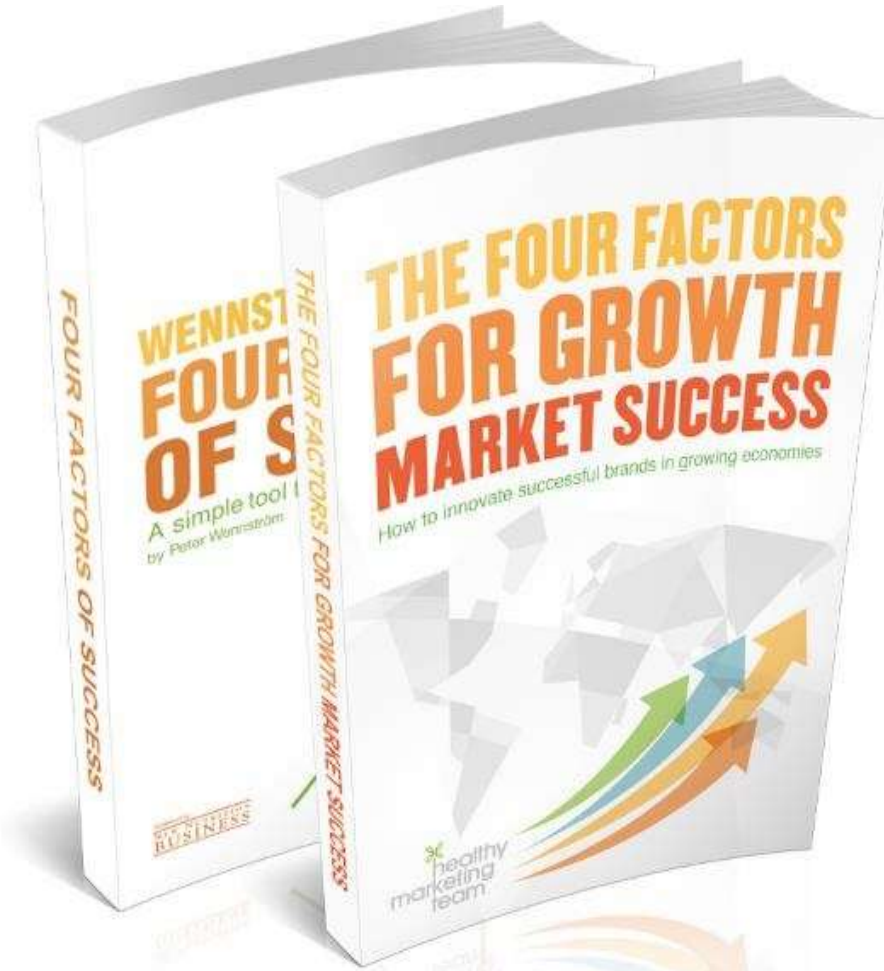


# The Four✕Factors® Brand Acceleration System

## The FourFactors® ブランドアクセルレーションシステム

A Consumer Centric System for Brand Driven Innovation and step by step decision making based on 20 years of global key learnings and best practices

ブランドの革新的運営を目指す顧客中心主義と、20年に及ぶ世界的な知見・経験に基づいた判断



### 1. WHAT are the TRENDS?

1. トrendは何か？

### 2. WHERE to PLAY?

2. どこで勝負するか？

### 3. HOW to WIN?

3. どうやって勝つか？



# The Four✕Factors® of Success

The value chain starts in the mind of the consumer

バリューチェーンは消費者の心の中から始まっています

**Factors of Motivation**  
モチベーションを高める要素

Who needs  
the product?

誰がその商品を  
必要としているのか？



Understand  
the benefit?

メリットを理解  
しているか？



Accept the  
ingredient?

原料を  
受け入れて  
もらえるか？



Trust the  
brand?

ブランドを信頼  
しているか？



**Factors of Permission**  
承認の要素



We used to see a world  
divided between food and medicine  
今までは「食」と「薬」に分けられた世界を見ていました

## Foods

for pleasure and sustenance



## Medicine

to cure you from your illness.



## However....



A majority of our illnesses are caused by **our foods and our lifestyles.**

病気の原因の多くは、  
食べ物や生活習慣にあります。

**Consumers** start to learn about the role of food for health, **seeking foods and diets to prevent illnesses and increase wellness.**

消費者は健康における食品の役割について学び始めており、病気を予防し、健康を増進する食品や食生活を求めています。



**Advances in nutrition science** opens a new understanding of how we not only can prevent but also **reverse and treat conditions with choice of foods, diets and lifestyle.**

栄養学の発展により、食品、食生活、ライフスタイルの選択によって、病気の予防だけでなく、治療・回復ができるという新しい理解が得られました。

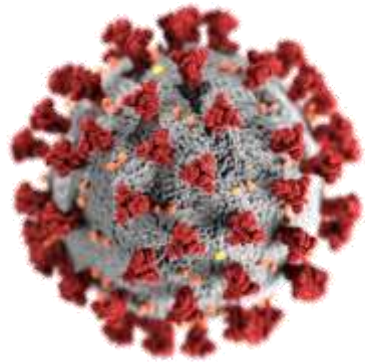


# COVID-19 accelerates people's awareness on the role of nutrition

COVID-19により栄養の役割がより認識されるようになりました

Result in soaring interest in Health and Wellness product

ヘルス&ウェルネス製品に注目が集まっています



COVID-19



Increased interest in  
immunity & mental wellbeing  
免疫力や精神的な健康への  
関心の高まり



Consumers proactively seek for:

消費者が積極的に求めている情報

- Food labelling (成分表示)
- Functional food solutions (機能性)
- nutrition and health claims (栄養や健康に関する表示)



# Conscious consumers are choosing supplements over medicine

意識の高い消費者は、薬よりもサプリメントを選んでいきます



**COVID-19 conscious consumers are choosing supplements over medicine and searching for better stress and weight management solutions, according to a recent webinar hosted by PharmaLinea and Mintel.**

- **“Covid-19 led to a big increase in preventive supplements”**  
コロナ禍において、予防を目的としたサプリメントが大幅に増加しました
- **Japanese who take supplement frequently up from 11% to 45%.**  
「サプリメントをよく摂取する」と答えた日本人は11%から45%に増加しました

Source: Nutraingredients, Euromonitor





The future of health spells  
***Nutrition***



This is the Pharma landscape - *isolated* (孤立化)

*not connected to diet and lifestyle,  
nor environmental and society*

Environment and Society

Diet and lifestyle ?

Physical  
health

Mental  
health



# This is the nutritional landscape

Environment and Society

Diet and lifestyle

Mental and  
physical health



# ***“Healthy people, healthy planet!”***

**Environment and Society**

**Diet and lifestyle**

**Mental and  
physical health**



***But what does it mean  
in the context of the trends we see in Japan?***  
これは日本のトレンドにおいてどのような意味を持つのでしょうか？



# Key trends span from society to personal sphere

社会全体から個人に及ぶ主要トレンド

Environment and Society

Diet and lifestyle

Mental and  
physical health

Sustainability (持続可能性)

Healthy Aging (健康的加齢)

Preventative Health (予防医学)

Functional Food (機能性食品)

E-commerce (E-コマース)

In-home Consumption (家庭内消費)



# ***Nutrition Strategies for Growth***



# 6 Global Gamechangers in the area of Health and Wellness

健康・ウェルネス分野における6つの世界的なゲームチェンジャー



**FOOD**  
FOR HEALTH  
& WELLBEING



**RESOURCES**  
ARE  
GETTING SCARCE



**SCIENCE**  
FOR  
A SMARTER FUTURE



**PEOPLE**  
ARE GETTING MORE,  
OLDER AND WEALTHIER



**PRODUCTION**  
WITH NATURAL  
& TRANSPARENT PROCESSES



**TECHNOLOGY**  
EMPOWER  
CONSUMERS



**ACTIVE  
NUTRITION**

**SUSTAINABLE  
NUTRITION**

**TARGETED  
NUTRITION**

**LIFESTAGE  
NUTRITION**

**NATURAL  
NUTRITION**

**i-NUTRITION**

## Leading to 6 Nutrition Strategies for Growth



# THE GROWTH STRATEGY #1: **ACTIVE NUTRITION**

## THE CHANGE

**Fuel**  
燃料



**building blocks and preventative health**  
積み上げと予防医療



**FOOD**

For health  
and wellbeing

# CONSUMER INSIGHT

## Japanese people take dietary supplements more frequently after COVID-19

コロナ禍において日本人のサプリメント摂取頻度が向上している



According to a survey by Rakuten Insight on dietary supplements in Japan conducted in 2020 after outbreak of COVID-19,

**45%** people say they were taking dietary supplements,

while **11%** stated their frequency of taking supplement increased

パンデミック発生後の2020年に楽天インサイトが実施した「日本における栄養補助食品に関する調査」によると、

**45%**の人が栄養補助食品を摂取していたと答えて

いる一方で、**11%**の人がサプリメントを飲む頻度が増えたと回答しています。

# Examples of Active Nutrition

## TREND: NATURAL IMMUNITY



### Korea Eundan Sales rocketed as consumers sought Immunity Support during Covid-19 (KR)

To strengthen immunity *during uncertain time*, consumers are seeking after ingredients such as vitamin-C or Traditional Chinese Medicine herbs. Sales of vitamin-C dietary supplements are also up five-folds on E-retail in China.



### Vitafusion Triple Immune POWER Vitamins Gummy (US)

These delicious gummies combine our RenewX *Prebiotic that nourishes the digestive tract where 70% of the immune system lives and immune powerhouses vitamins C&D*. It also includes 50mg of elderberry per serving.

# Examples of Active Nutrition

## TREND: MENTAL WELLNESS & “FOOD FOR THOUGHT”



### OLLY Goodbye Stress Gummy (US)

With a blend of GABA & L- Theanine to **keep calm and stay alert**. These gummies work fast to help counter the bad vibes, with a boost of just what your body needs to help you stay calm, cool and collected.



### IQ Bar (US)

Formulated with **6 brain nutrients** – **Omega-3s, MCTs, Lion's mane, flavonoids, vitamin-E, Choline**- IQBARs are protein bars made with clean-label ingredients rich in compounds shown to benefit the brain and body.



# RESOURCES ARE GETTING SCARCE

THE GROWTH STRATEGY #2  
SUSTAINABLE NUTRITION

THE CHANGE

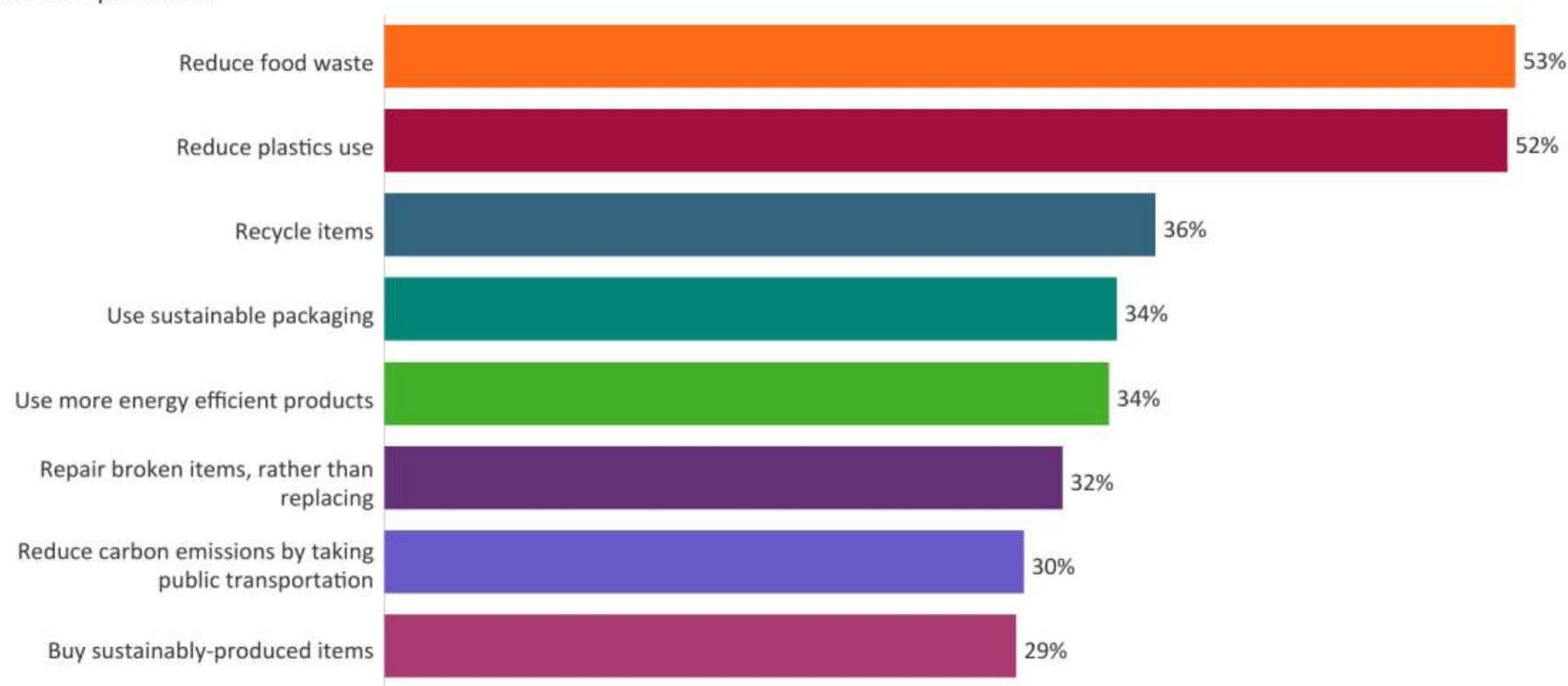
Seemingly “unlimited” —→ **limited**

## Consumer Insight

**Sustainability in Japanese eyes means reducing plastic and waste, companies need to take more grounded social responsibilities**

日本人にとってのサステナビリティとはプラスチックや廃棄物の削減であり、企業はより地に足をつけた形で社会的責任を果たす必要がある。

% of respondents



Source: Statista, 2020

# Examples of Sustainable Nutrition

## Japan SDGs Award



Japan SDGs Award was established in an attempt to promote a wide range of actions for sustainable development.

**“Japanese consumers wanting to contribute to a better and healthier society through mindful and holistic consumption** by buying sustainable products, it makes them feel good about their purchase. More aligned to their values, and is slowly becoming a new way of life.”

「日本の消費者は、サステナブルな製品を購入し、  
思慮深く影響力の大きい消費を通して  
より良く健康的な社会に貢献したい  
と考えています。これは価値観に近く、  
徐々に新しい生活スタイルになりつつあります。」



# SCIENCE

For a smarter future

THE GROWTH STRATEGY #3:

## TARGETED NUTRITION

THE CHANGE

Pharma → food

# Examples of Targeted Nutrition

Good Rest can be Achieved with Functional Ingredients and Adaptogens (機能性成分とアダプトゲンが良い眠りをもたらします)



## Rest Sleep Aid + Zen Stress Release by WellPath (US)

Zen uses Premium Herbal Formula to **support Calm, Positive Mood** with Ashwagandha, L-Theanine, Rhodiola - for occasional anxiety;  
Rest help improve your sleep quality and support feeling relaxed.



## Nicedream (Thailand)

The drink offers to help **relaxation, good sleep quality and bright brain** from L-theanine



PEOPLE

are getting  
more and older

THE GROWTH STRATEGY #4

LIFESTAGE NUTRITION

THE CHANGE

One View —→ My View

# Examples of LifeStage Nutrition

## HEALTHY AGING



### CPT elderly sport nutrition (CH)

was **developed based on the seniors' demand for muscle, bone, and joint strengthening** including:

- A collagen powder sachet for joint health and endurance exercise
- A protein powder for supporting speed-related exercise
- A blend of calcium, magnesium, and vitamin D



### TruBrain Clockwise(US)

Take charge of your long-term brain health with daily enzymes to slow brain aging at a cellular level. Made with ingredients validated by the National Institutes of Health.



# PRODUCTION

with natural &  
transparent processes

THE GROWTH STRATEGY #5:

**NATURAL NUTRITION**

THE CHANGE

**Processed** → **Natural**



# Examples of Natural Nutrition

## TRANSPARENCY & CLEAN INGREDIENT (透明性とクリーンな原料)



### Upfront food (NL)

Upfront foods wants to take **transparency** to the next level by starting with listing all the information on front of the pack.



### Phoric natural energy drink (NZ)

**Clean energy boosting drinks** containing caffeine mainly from Guayusa leaf and little amount coming from green coffee beans.



# TECHNOLOGY

Empowering consumers



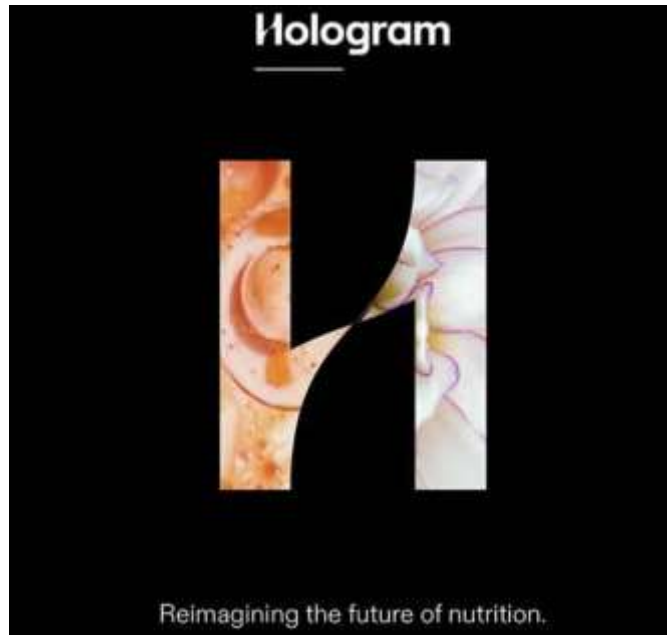
THE GROWTH STRATEGY #6:

**I-NUTRITION**

THE CHANGE

**Product-driven → Consumer-driven**

# Examples of i- NUTRITION



## Hologram Sciences(US)

By combining health diagnostics, digital coaching and personalized nutrition, Hologram Sciences provides consumers with cutting-edge and personalised solutions to manage their health.

**Hologram Sciences**は、健康診断、デジタルコーチングおよび個別栄養を組み合わせることにより、消費者に健康管理のための最先端かつパーソナライズされたソリューションを提供しています。



## [myAir](#) (ISR)

MyAir is Personalized, stress-countering nutrition bars based on consumers' specific stress profiles and cognitive needs. MyAir's algorithm monitors each customer's personal stress levels via a smart watch and send monthly subscription box based on the data.

**"Feeling stressed? Get some Air."**

# Poll:

## What Growth Strategy will drive Your Innovation?

イノベーションを起こす成長戦略はどれだと思いますか？



**FOOD**  
FOR HEALTH  
& WELLBEING

**ACTIVE  
NUTRITION**  
(アクティブ栄養)



**PRODUCTION**  
WITH NATURAL & TRANSPARENT  
PROCESSES

**NATURAL  
NUTRITION**  
(自然の栄養)



**RESOURCES**  
ARE  
GETTING SCARCE

**SUSTAINABLE  
NUTRITION**  
(持続可能な栄養)



**SCIENCE**  
FOR  
A SMARTER FUTURE

**TARGETED  
NUTRITION**  
(ターゲット栄養)



**PEOPLE**  
ARE GETTING MORE, OLDER  
AND WEALTHIER

**LIFESTAGE  
NUTRITION**  
(ライフステージ  
栄養)



**TECHNOLOGY**  
EMPOWER  
CONSUMERS

**i-NUTRITION**  
(i-栄養)



# ***“The value chain starts in the mind of the consumer!”***

The FourFactors® for a  
successful brand innovation in  
health and wellness:

健康・ウェルネス分野の  
ブランドイノベーションを成功させる  
FourFactors®の紹介

- ☒ **Need the product**
- ☒ **Accept ingredient**
- ☒ **Understand benefit**
- ☒ **Trust the brand**

**Environment and Society**

**Diet and lifestyle**

**Mental and  
physical health**



The focus of this year's report

# Fast Forward to The Mass Market!

## Global Game Changers 2021

Trends – Consumers – Brands

**Fast Forward to the Mass Market!  
Where to Play and How to Win in 2021?**



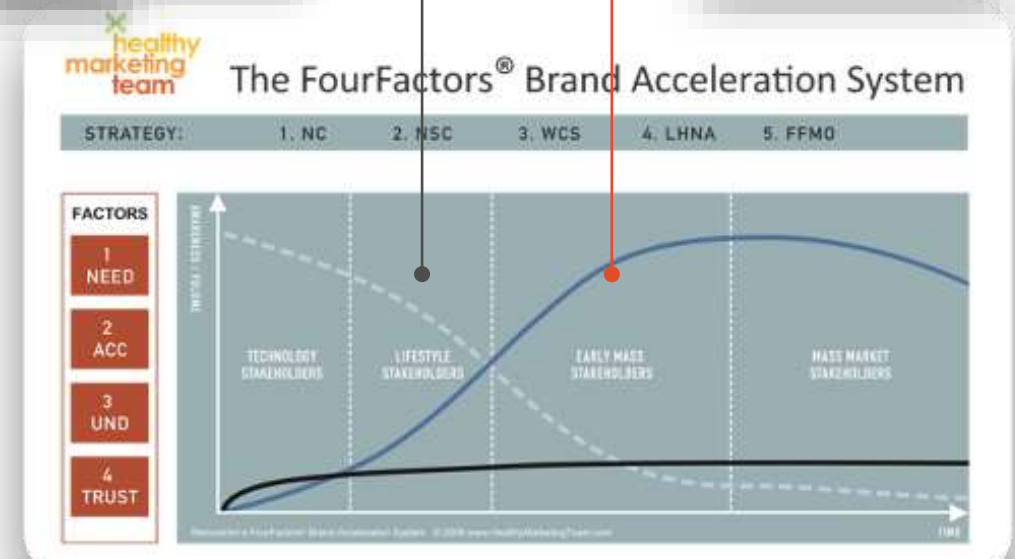
Focus of 2019 & 2020 Report:

**Lifestyle**



Focus of 2021 Report:

**Early Mass Market**



# Download the Global GameChangers 2021 Report, Get 2019 & 2020 reports for additional inspiration!

Email: [Ida@thehmt.com](mailto:Ida@thehmt.com)



# HMT ONLINE TRAINING

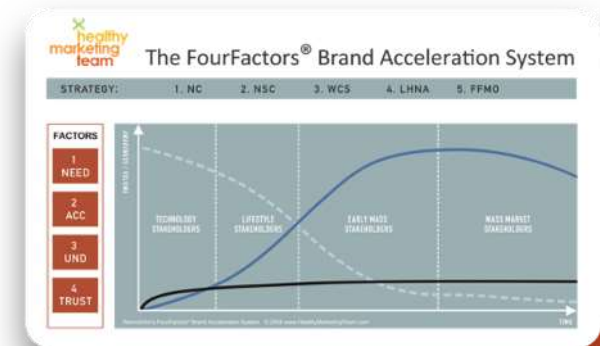
<https://fourfactors-academy.teachable.com/>

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# healthy marketing team

Brand Strategy & Innovation Consultants For The Global Nutrition Industry

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