



Health & Wellness Trends in APAC 2025



Consumer Experts, Insight Driven

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A hand holding black chopsticks is positioned at the top of the page. Below it, a black bowl filled with ramen is visible. The ramen includes yellow noodles, a slice of boiled egg, green onions, bean sprouts, and other toppings. The background is a light peach color, transitioning to a dark green at the bottom.

Introduction

In Asia-Pacific, consumers continue to take a proactive approach to health and wellness, especially as they feel that various aspects of their well-being could be improved and that their diets and lifestyles are currently acting as a barrier to wellness, especially as they return to their busy lives. Moreover, consumers believe that they face various levels of uncertainty and challenges, some of which they have little to no control over.

As such, consumers are focusing more on day-to-day health, and emotional wellness, looking to navigate an era of uncertainty and addressing wellness issues where improvements are easier to measure.

Consumers now assess their well-being based on their daily experiences and self-perception, rather than solely out of fear of illness and disease.

Particularly there has been a rise in efforts to enhance sleep patterns, as consumers acknowledge the crucial role of emotional well-being in addition to physical health. Many individuals in the region are dissatisfied with the quality and quantity of their sleep. Looking ahead, consumers foresee challenges stemming from the increasing costs of health and wellness products. This is expected to affect their daily routines in terms of making trade-offs in nutrition and experiencing elevated stress levels due to worries about affordability.

Therefore, consumers are likely to become more price-conscious while still seeking out health and wellness products. This shift signifies that consumers are transitioning towards a more discerning approach that evaluates both the value and necessity of such products.

Seven in ten consumers in Asia-Pacific rate their health as good or excellent



Even as the fear surrounding the pandemic diminishes, consumers continue to prioritize maintaining a healthy lifestyle, emphasizing prevention over cure from a wellness standpoint. Despite being mindful of factors such as diet and stress levels in relation to how consumers rate their health, 73% of individuals feel their health is good or excellent, indicating a sense of resilience towards serious diseases and illnesses.

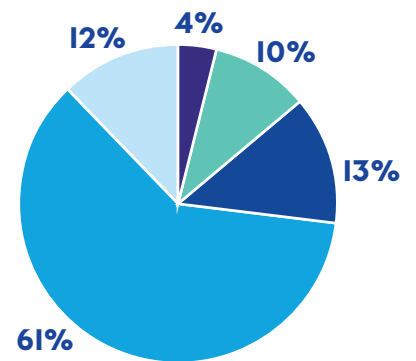
Consumers are focused on a proactive approach to health

Consumers are likely to feel assured about their well-being due to the fact that almost half of them see an improvement in their health over the past two years. This highlights a shift towards a more proactive approach to well-being during the pandemic. As society gradually returns to normality post-pandemic, individuals will be eager to sustain the progress they have achieved.



Overall, how do you rate your health? 2024

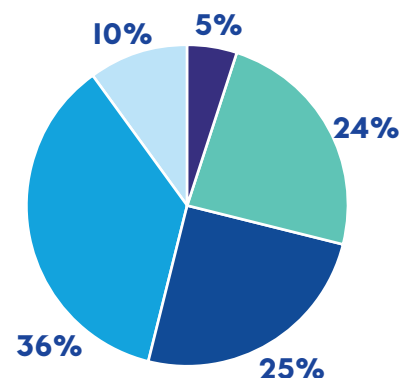
Asia-Pacific



- Very poor
- Poor
- Not sure
- Good
- Excellent

Do you feel your health has changed in the last two years? 2024

Asia-Pacific



- It has worsened considerably
- It has worsened slightly
- Not sure
- It has improved slightly
- It has improved considerably

You state you have changed your diet. What steps have you taken?
2024

Asia-Pacific – Top five answers

Respondents who selected “Changed my diet” to the question “What steps you have taken to improve your emotional health?”

58%

Eaten more fruit and vegetables

49%

Eaten more fresh food

45%

Cut down on snacking

36%

Looked to reduce sugar intake

34%

Sought out products that contain ingredients associated with improving emotional health

Consumers in Asia-Pacific have taken steps to change their dietary habits

In terms of eating and drinking habits, consumers want to avoid feelings of compromise

45%

of consumers in Asia Pacific plan to improve their sleep health over the next year. 2024

57%

of consumers in Asia Pacific have attempted to improve their diet in the last two years. 2023

The concept of a “diet” is subjective and open to interpretation, particularly among consumers in the Asia-Pacific region. Many individuals are not entirely content with their dietary practices, with a heightened awareness of their waistlines and the potential for weight gain, especially amid uncertain times. Concurrently, obesity rates in the region continue to climb despite efforts to enhance eating and drinking habits. This can be attributed to the fact that dietary plans often

fail due to the perceived need for compromise and sacrifice.

While avoidance of certain foods remains a priority for consumers, the perception of healthy eating is evolving to encompass a balanced diet that includes a variety of products, including occasional treats. These attitudes suggest that healthy diets are no longer viewed as a short-term solution for weight loss, but rather as a long-term lifestyle choice that should not evoke a sense of compromise.

Consumers measure their health based on their waistline

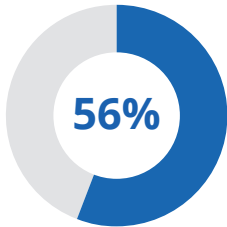
Consumers are evaluating their health based from a day-to-day perspective

A noticeable trend among consumers in the post-pandemic era is the shift away from long-term, “hard” health concerns (primarily the fear of illness and disease) towards a focus on softer, day-to-day health issues. Consumers now assess their wellness based on their subjective feelings and physical appearance.

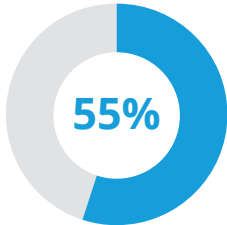
In the Asia-Pacific region, individuals commonly evaluate their health based on their waistlines and their

overall sense of fitness and activity levels, recognizing the interconnectedness of these factors. Many consumers are mindful of the potential for weight gain in the coming twelve months due to increased reliance on comfort eating to cope with stress, as well as concerns about having to make trade-offs between nutrition and affordability, which can affect energy levels. Additionally, these stress-induced feelings can impact energy levels by affecting relaxation time and sleep patterns.

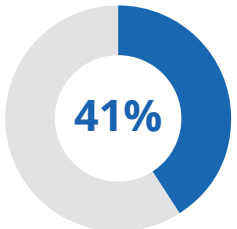
Please now think about the concept of health in general. How do you measure good health? 2023
Asia-Pacific



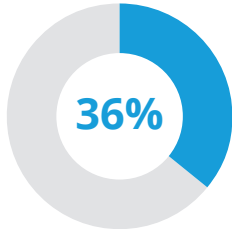
My waistline



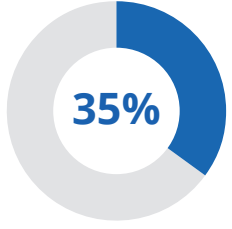
How fit & active I am



My mental wellbeing



How much I exercise



My dietary habits

The proportion of consumers in Asia Pacific who are satisfied with the following areas of their health.

2024

Asia Pacific

45%
Mood

40%
Stress / anxiety levels

47%
Energy levels

46%
Cognitive / brain health
(i.e. memory, ability to concentrate and focus)

41%
Quality of sleep

50%
Average hydration levels

Consumers in Asia-Pacific are taking a proactive approach to wellness

They recognize the crucial role of sleep health alongside emotional wellness and physical health

In recent years, consumers in Asia-Pacific have adopted a proactive approach towards health, emphasizing the importance of maximizing wellness. This has led individuals to actively seek out ways to make significant changes to their diets and lifestyles, acknowledging the long-term impact of certain lifestyle habits on overall well-being. Furthermore, consumers in Asia-Pacific have focused on enhancing their sleeping

patterns over the past twelve months. Recognizing the essential role of emotional wellness alongside physical health, people understand that poor sleep not only affects mood and energy levels but also increases the risk of more serious health complications. Despite this awareness, many individuals in the region express dissatisfaction with both the quality and quantity of their daily sleep.



Consumers in Asia-Pacific perceive sleep health and dietary habits as interconnected

Consumers are more mindful of their screentime in the evening

As mentioned earlier, addressing sleep health is a key focus for consumers in Asia-Pacific, and they are actively taking measures to enhance it. It is worth noting that while macro-economic factors can influence sleep health, individuals' actions suggest that poor sleeping patterns may be a result of self-imposed habits. For example, the predominant action taken by consumers is improving dietary practices,

indicating that behaviors such as overeating, inadequate monitoring of micronutrient intake, and irregular meal schedules/late-night eating can negatively affect both the quantity and quality of sleep. Furthermore, consumers are increasingly aware that spending time on digital devices, especially right before bedtime, can also disrupt their sleep patterns, with a growing understanding of the impact of blue light.



You state that you have looked to improve your sleeping patterns over the last twelve months. What steps have you taken? 2023

Asia-Pacific – Top three answers – Consumers who have looked to improve their sleeping patterns



62% Changed my diet



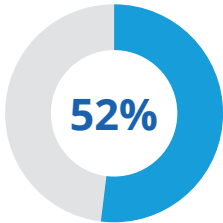
60% Avoided smartphone/laptop/tablet in the evening



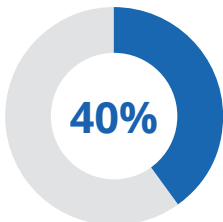
52% Improved sleep hygiene

Do you feel that having good energy levels can have a positive impact on other areas of well-being?
2024

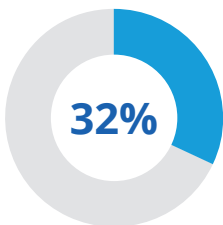
Asia-Pacific



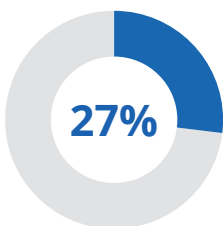
Sleep health



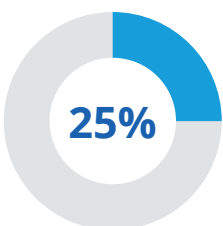
Mental wellbeing / mood



Cognitive / brain health



Immune health



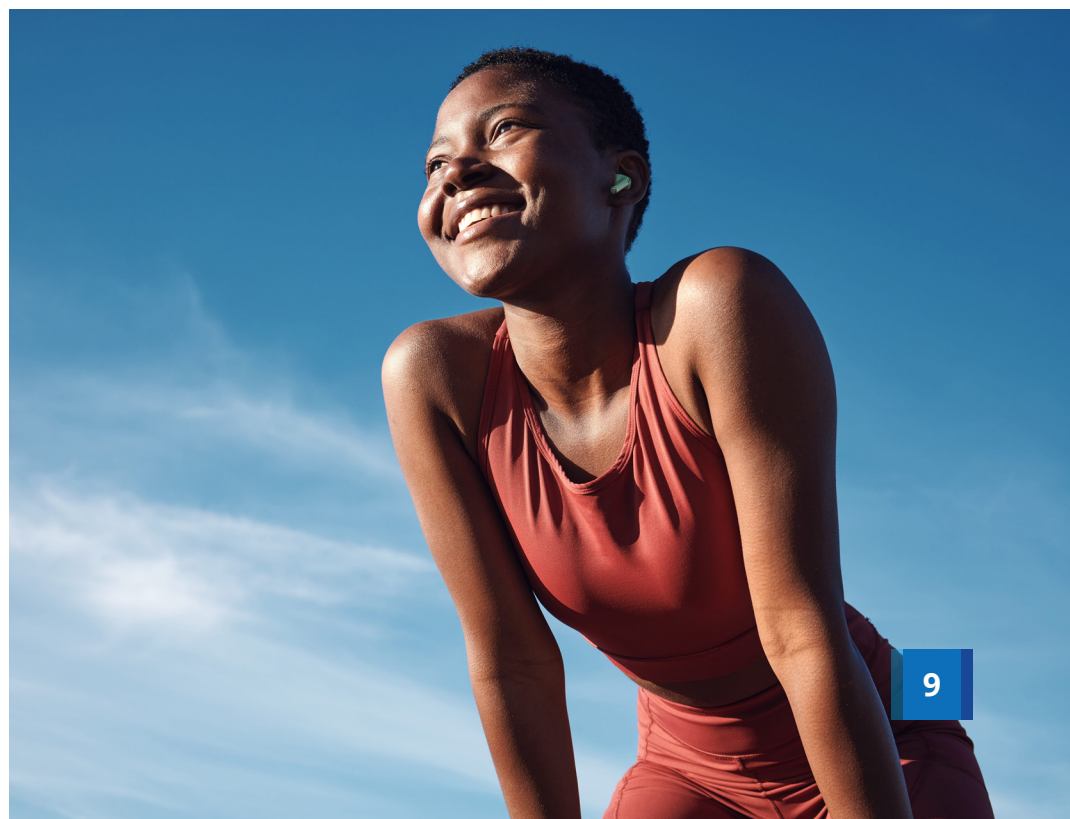
Hydration levels

Energy levels are impacting other areas of wellbeing

Mood enhancement and happiness are being prioritized by consumers

Consumers are reassessing the significance of energy and mood, acknowledging their crucial impact on overall health and well-being. Instead of simply seeking quick solutions for tiredness and low energy, consumers are changing their perception of energy, linking it to broader health considerations. Continued fatigue and tiredness are no longer viewed as isolated issues but are seen as indicators of underlying health concerns.

Consequently, consumers are searching for food and beverage products that can tackle these root causes by prioritizing sustained energy levels and mood improvement over short-term energy boosts. This shift in consumer mindset is driving a demand for products that provide lasting benefits, including ingredients that promote mental clarity, stress reduction, and emotional balance, reflecting a comprehensive approach to managing energy and mood for enhanced overall wellness.



Four in ten consumers in APAC want to improve their daily energy levels

Many deem this directly linked to their holistic health



40%

of consumers in APAC want to improve their daily energy levels, which they deem directly linked to their immune health. 2024



42%

of consumers in APAC measure their immune health based on their energy levels. 2024

With the notable change in consumer preferences towards energy-enhancing items, there is a growing inclination towards options that provide “clean” energy alongside extra nutritional advantages. Consumers aiming to combat persistent tiredness and enhance their ability to tackle everyday obstacles are particularly attracted to products that promise energy-boosting effects. These individuals are keen on experiencing renewed vitality throughout the day,

contributing to the appeal of such products. The demand for energy-boosting items delivering sustainable energy, free from the typical crash associated with traditional stimulants, is increasing. With consumers becoming increasingly mindful of their health and emphasizing overall well-being, products offering clean energy sources and additional nutritional benefits are gaining momentum in the market, aligning with the changing preferences of today’s consumers.



Consumers recognize the link between hydration and overall well-being

This is something that can impact on various aspects of health that consumers are looking to improve over the next twelve months



Do you associate having good hydration levels/being hydrated with having a positive impact on the following areas of wellbeing? 2024
Asia Pacific

36%
Sleep health

32%
Mental wellbeing / mood

30%
Energy levels

Consumers understand the significance of staying hydrated and maintaining overall well-being, as they are well aware that dehydration can lead to severe health issues. In addition, consumers acknowledge the positive effects of adequate hydration on both physical and emotional health, particularly in relation to the wellness factors prioritized by many in their daily lives. However, research shows that a small number of consumers report

feeling adequately hydrated most of the time or always during a typical week. This indicates that there are occasions when individuals feel the need to hydrate (often through beverages) but either cannot or choose not to do so, possibly due to being preoccupied with personal and professional responsibilities. Inadequate hydration can have immediate physical and cognitive consequences, such as fatigue and difficulty concentrating, with potential long-term implications as well.

Time scarcity can be deemed a barrier to leading a healthy lifestyle

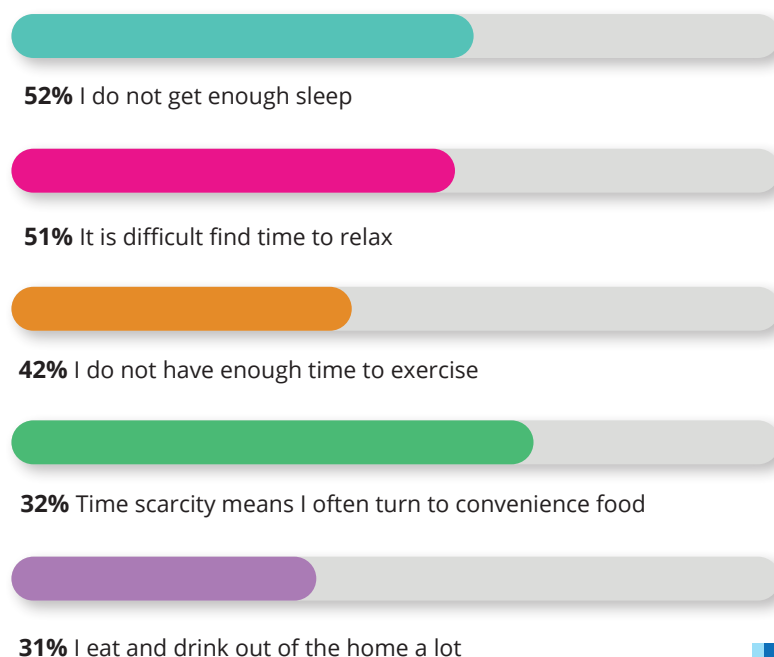
Consumers' busy lives can impact their sleep, dietary habits, and physical activity

When examining health and wellness, it is crucial to consider the discrepancies between attitudes and behaviors. While individuals show a stronger commitment to leading healthier lives, the prevalence of diet and lifestyle-related health issues continues to increase, making it difficult for people to adhere to their health goals. The truth is that consumers experience various challenges when striving to adopt healthier habits, and as society transitions back to normality post-pandemic, busy lifestyles will pose a significant barrier.

Whether perceived or real, individuals feel pressed for time and believe this can affect their dietary choices. As a result, there will be a high demand for health and wellness products that are perceived as convenient and easy to use or prepare.



What challenges do you feel exist when it comes to leading a healthy lifestyle? 2023 Asia-Pacific



Consumers are concerned about rising prices impacting their health

Consumers are worried about the healthiness of their diet and feelings of stress

26%

of consumers in Asia Pacific state they are worried about personal finances/ability to handle living costs. 2024 (EMO174)

Another obstacle that individuals in Asia-Pacific anticipate encountering in the next twelve months is the influence of escalating prices on their health and wellness routines. They expect that price increases will affect them in two ways: firstly, by requiring them to make trade-offs between nutrition and affordability when purchasing products, and secondly, by causing heightened feelings of stress and anxiety.

In truth, the impact of rising prices will persist over the long term, necessitating the industry to inform consumers about ways to maintain a healthy diet within budget constraints, dispelling the notion that healthier products always come at a higher cost. This also implies a strong demand for products that facilitate relaxation, provide an avenue for unwinding, and help individuals disconnect from their daily pressures.

Have you done any of the following in the last six months to try and save money?

2023

Asia Pacific – Top five answers

61%

Made active attempts to reduce my use of energy at home

41%

Reduced spending on presents for birthdays/the Christmas period

36%

Attempted to walk to places I would normally drive to

35%

Cut down on “big ticket” items, like not going on holiday or buying electronics

35%

Not purchased new clothes when I needed to

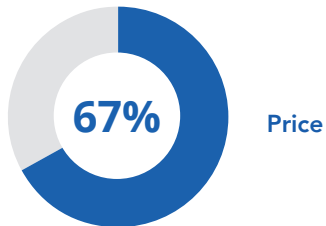
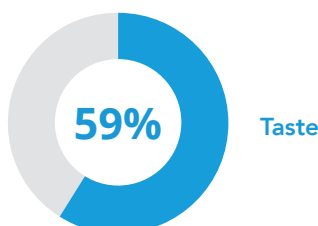
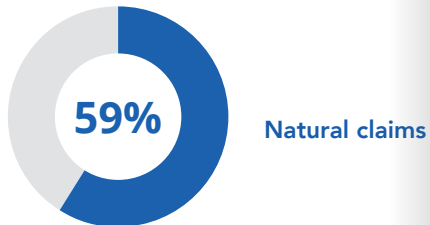
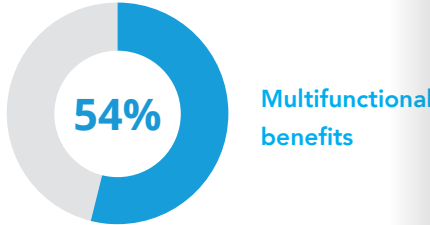
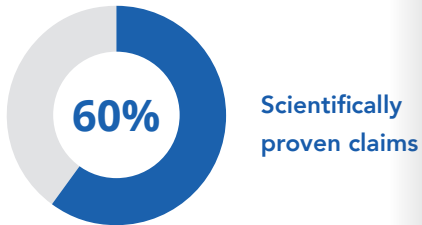
Value is essential during a recessionary landscape

Consumers are seeking out products that they feel have maximum convenience and efficacy

Even though consumers will be mindful of prices in the coming twelve months, they will continue to pursue health and wellness products. However, a trend will be the shift in attitudes from pursuing health at any cost to a more thoughtful approach, with consumers questioning the value and necessity of products. It is important to keep in mind that value holds greater significance

for consumers, and they will still be open to trading up within the wellness market. Nevertheless, it is essential for products to be perceived as uncompromising (due to exceptional taste) and effective in sustaining health, which can be achieved by promoting multiple health benefits and providing scientific evidence to support their claims.

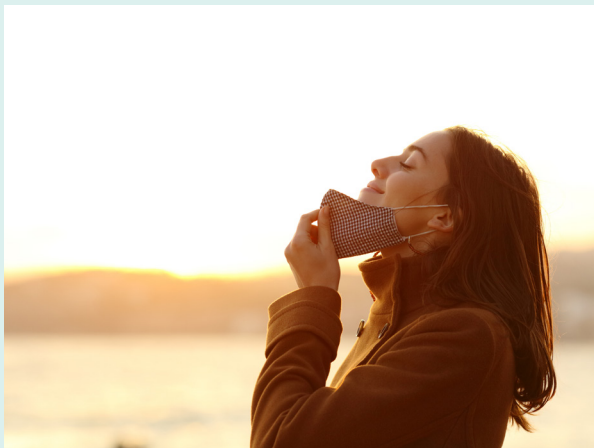
What product attributes will shape your perceptions of value when purchasing health products? 2023
Asia-Pacific – Top five answers



Our Conclusions

#1 How Consumers Evaluate their Health

Consumers are prioritizing a proactive approach to maintaining their health and wellness, emphasizing prevention over cure. In the current post-pandemic environment, many consumers are assessing their health based on their daily experiences and perceptions, encompassing both physical and mental well-being, as well as their self-image.



#2 The Measures Consumers are Taking to Address their Health

In the upcoming twelve months, consumers will focus on prioritizing various aspects of their health. This includes efforts to enhance their sleep patterns, as a significant number of consumers recognize the influence of sleep health on overall well-being. To achieve this, consumers will seek to improve their dietary habits and reduce their use of technology in the evening.



#3 Emphasis on Convenience and Value

Following the pandemic, consumers are experiencing a greater sense of time scarcity. Consequently, convenience and effectiveness are appealing product features for consumers. This strengthens the perceived value of products, which is particularly important in today's inflationary economic climate, where consumers are seeking products that offer good value for money.

Additional Reading

Active Nutrition in 2024

Explores the trends in active nutrition. Our findings offer insight into the behaviors and attitudes toward their health and wellness, including specific lifestyle and dietary habits.

FMCG Gurus

Regional Report

Active Nutrition



Mobility Health: Navigating Challenges and Solutions

Generally, consumers are known for taking a proactive approach to their health. Although some of the urgency in maximizing well-being seen during the pandemic has diminished. However, when it comes to mobility health, consumers tend to be more reactive...

FMCG Gurus

Blog

Mobility



Cognitive Health: Proactive and Holistic Approaches

Despite a slight decrease compared to 2021 when consumers...

FMCG Gurus

Blog

Cognitive Health



Heart Health in 2024

Our findings unveil the key consumer motivations and product attributes when purchasing heart health aiding food and drink and explores the kind of heart health problems consumers experience.

FMCG Gurus

Regional Report

Hot Drinks

Emotional Wellness in 2024

Explores consumer purchasing habits toward their emotional wellness. Unveil motivations and product attributes when purchasing emotional wellness aiding food and drink.

FMCG Gurus

Regional Reports

Wellness



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