

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The majority of consumers turn to some form of OTC digestive aids to treat gastrointestinal distress, with antacids accounting for the largest share of all digestive health remedy sales. Looking forward, consumers' need for digestive health treatments is not expected to change, however interest in proactive health options such as probiotics and prebiotics is growing."

- Marissa Gilbert, Health and Wellness Analyst

This report looks at the following areas:

- Despite solid 2015 gains in digestive health, some leading companies suffer loses
- · Stomach remedies/antidiarrheals dominated by two brands; experiences lowest growth
- · Nearly one third of adults choose no treatment when experiencing discomfort

This report focuses on the products marketed for digestive health or digestive relief that are available over the counter (OTC)/without a prescription.

The following items are excluded from the scope of this report: Enemas, lactose-intolerance medications, emetics/anti-emetics, and home remedies.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Despite solid 2015 gains in digestive health, some leading companies suffer loses

Figure 1: MULO sales of digestive health remedies, by leading companies, rolling 52 weeks 2014 and 2015

Stomach remedies/antidiarrheals dominated by two brands; experiences lowest growth

Figure 2: MULO share of stomach remedies/antidiarrheals sales, by leading brands, rolling 52 weeks 2014 and 2015

Nearly one third of adults choose no treatment when experiencing discomfort

Figure 3: Treatment approach to gastrointestinal issues, by level of discomfort, April 2015

The opportunities

Positioning remedies as tools that support total digestive health

Figure 4: MULO sales of Metamucil, rolling 52 weeks 2014 and 2015

Interest in probiotics and prebiotics could offer market sales boost

Figure 5: Use of probiotics and prebiotics to manage or treat digestive health issues, April 2015

Gummies and on-the-go formats offer convenient discretion

What it means

The Market - What You Need to Know

Digestive health market posts solid gains, steady growth projected

OTC remedies are challenged by alternative options

Varying factors are likely to positively impact market growth

Market Size and Forecast

OTC digestive health market poised for future growth after solid 2014

Figure 6: Total US sales and fan chart forecast of digestive health remedies, at current prices, 2010-20

Figure 7: Total US retail sales and forecast of digestive health remedies, at current prices, 2010-20

Market Breakdown

Antacids hold category lead; gain larger share of digestive health market

Figure 8: Total US retail sales and forecast of digestive health remedies, by segment, at current prices, 2010-20

All retail channels positively impacted by digestive health market growth

Figure 9: US retail sales of digestive health remedies, by channel, at current prices, 2010-14

Market Perspective

Some digestive health sufferers choose non-treatment

Figure 10: Treatment approach to gastrointestinal issues, April 2015

Severe discomfort requires prescription strength treatment



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Use of prescription medication, by level of discomfort, April 2015

Consumers are turning to diet changes and supplements for relief

Figure 12: Diet and supplement behaviors for digestive health, April 2015

Market Factors

An aging US population bodes well for the digestive health market

Figure 13: Use of digestive health remedies, by age, February 2014 - March 2015

Stress causes gut-wrenching issues

Obesity rates hint at stability for digestive remedy use

Figure 14: American adults, by weight category as determined by body mass index (BMI), 2008-14

Key Players - What You Need to Know

Digestive health market posts gains, largely a result of Pfizer success

Metamucil's Meta and gummy formats boost sales

Private label is challenging branded products; Tums sales suffering

Prebiotics, digestive diets and a medical innovation gain traction

Manufacturer Sales of Digestive Health Remedies

Pfizer's successful launch of Nexium 24HR boosts digestive market sales

Manufacturer sales of digestive health

Figure 15: MULO sales of digestive health remedies, by leading companies, rolling 52 weeks 2014 and 2015

Each digestive health segment post gains; leading brands remain on top

What's Working?

Purple pill's Rx-to-OTC transition puts Pfizer on the digestive health map

Figure 16: MULO sales of select OTC PPI antacid brands, by leading companies and brands, rolling 52 weeks 2014 and 2015

Metamucil experiences the Meta effect with new wellness brand

Figure 17: Meta Wellness Elevator Commercial, Published on Dec 4, 2014

Gummy products proving successful for brands, appealing to consumers

What's Struggling?

Branded digestive health products struggle to maintain market share

Figure 18: Private label vs branded share of digestive and detoxifying treatment product introductions, 2010-14

Figure 19: MULO share of stomach remedies/antidiarrheals sales, by leading brands, rolling 52 weeks 2014 and 2015

Leading antacid brand Tums suffers major sales declines

Figure 20: MULO sales change of Tums antacid brands, from rolling 52 weeks 2014 to 2015

Figure 21: MULO sales of Tums and Rolaids products, 2009-14

What's Next?

Probiotic appeal is expanding into prebiotics

Figure 22: Proactive methods of managing or treating digestive health issues, April 2015

Diet plans highlighting digestive health as a key to wellness

Nanojuice highlights gastrointestinal issues; human trials on the horizon

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Consumer - What You Need to Know

Majority experience gastrointestinal issues, main causes are diet and stress

Most sufferers notice discomfort and treat accordingly

Diet, lifestyle and OTC use is prevalent, supplement appeal is growing

Gastrointestinal Issues Experienced

Two-thirds of adults experience digestive issues

Figure 23: Gastrointestinal problems experienced in past year, April 2015

Women are more likely to be impacted by gas/bloating and constipation

Young adults' digestive issues may be sensitive topics

Contributors to Gastrointestinal Issues

Diet and stress are the leading contributors to digestive imbalance

Figure 24: Role of diet and stress on gastrointestinal issues, April 2015

Obese adults more likely to link diet with their gastrointestinal issues

Gastrointestinal Discomfort Levels

Gastrointestinal issues cause sufferers noticeable discomfort

Figure 25: Level of discomfort experienced from gastrointestinal issues, by issues experienced in past 12 months, April 2015

Discomfort level influences consumers' approach to treatment

Figure 26: Treatment approach to gastrointestinal issues, by level of discomfort, April 2015

Approach to Digestive Health Treatment

Most adult sufferers choose to treat gastrointestinal discomfort

Figure 27: Treatment approach to gastrointestinal issues, by select issues experienced in past 12 months, April 2015

Methods of Managing Digestive Health - Medications

Appeal of OTC digestive health medications is impacted by need

Figure 28: Appeal of OTC medications for managing or treating digestive health issues, April 2015

Methods of Managing Digestive Health – Supplements

Supplement use is currently limited, yet interest is strong

Figure 29: Interest in proactive remedies for managing or treating digestive health issues, April 2015

Natural supermarket sales of prebiotics and probiotics indicate mainstream opportunity

Figure 30: Natural supermarket sales of digestive health remedies, rolling 52 weeks ending Feb 24, 2013 and Feb 22, 2015

Parents are most engaged with supplements and enzymes

Figure 31: Usage of and interest in supplements and enzymes for managing or treating digestive health issues, by parent status, April 2015

Greater discomfort necessitates the addition of proactive care measures

Figure 32: Usage of and interest in supplements and enzymes for managing or treating digestive health issues, by severe/moderate discomfort, April 2015

Methods of Managing Digestive Health – Diet and Lifestyle

Diet additions, deductions, and exercise are priority for digestive health

Figure 33: Diet modifications to manage or treat digestive health issues, April 2015

Figure 34: Lifestyle changes to manage or treat digestive health issues, April 2015

BUY THIS REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix - Market

Sales and forecast

Figure 35: Total US retail sales and forecast of digestive health, at inflation-adjusted prices, 2010-20

Figure 36: Total US retail sales and forecast of digestive health, by segment, at current prices, 2010-20

Retail channels

Figure 37: Total US retail sales of digestive health, by segment, at current prices, 2013 and 2015

Figure 38: Total US retail sales of digestive health, by channel, at current prices, 2010-15

Figure 39: Total US retail sales of digestive health, by channel, at current prices, 2013 and 2015

Natural channel sales

Figure 40: Natural supermarket sales of digestive health products, by organic ingredients, at current prices, rolling 52 weeks ending Feb. 24, 2013 and Feb. 22, 2015

Appendix – Key Players

Antacids

Figure 41: MULO sales of antacids, by leading companies and brands, rolling 52 weeks 2014 and 2015

Laxatives

Figure 42: MULO sales of laxatives, by leading companies and brands, rolling 52 weeks 2014 and 2015

Stomach remedies/antidiarrheals

Figure 43: MULO sales of stomach remedies/antidiarrheals, by leading companies and brands, rolling 52 weeks 2014 and 2015

EMAIL: reports@mintel.cor